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ETHNIC GROUPS AS MARKET SEGMENTS:
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IMPLICATIONS OF THE DEMAND STRUCTURE  
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THESIS SUBMITTED FOR THE DEGREE OF
DOCTOR OF PHILOSOPHY

NEELAM KINRA

FACULTY OF MANAGEMENT
THE UNIVERSITY OF ASTON IN BIRMINGHAM
AUGUST 1983

ABSTRACT

ETHNIC GROUPS AS MARKET SEGMENTS: IMPLICATIONS OF THE DEMAND STRUCTURE

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Ethnic market potential in Britain has not yet been thoroughly researched. Important recent trends have focused mainly on the affective and emotional aspects of ethnicity, and included deliberations on the emergence of a revitalised neo-ethnic consciousness, its identification, politicisation, and the impact on it, of a rising third-world consciousness.

This investigation attempts to take cognizance of the consumer demand of the ethnic Asian and West Indian groups, as specific market segments. It discusses the rationale for ethnic segmentation on the underlying premise, that the starting point for all product marketing is a response to perceived market opportunities.

On the basis of this approach, the UK laundry detergent and automobile markets were investigated, as being representative of product categories constituting extremes along the purchase-search-time continuum in consumer decision-making. Ethnic groups were further analysed for their retail patronage patterns, media usage, and the differential effectiveness of alternative advertising strategies.

The basic technique of marketing research namely the sample survey, was used with the aim of applying scientific techniques in obtaining information on ethnic groups. The integrated marketing framework utilised allowed, moreover, for the collection of market research data on the specific issues of ethnic product penetration dealing with retailing, advertising and product promotion.

The evidence highlights the fact that the cultural orientations of ethnic groups are instrumental in providing for differential demand structures. It points to the answer that ethnicity is an anchor not only for a deeper sense of identity, but also serves as a focus for the economic interests of ethnic groups. On this basis it is argued here, that since cultural levelling would eventually produce stagnation, current marketing strategies should utilise ethnic diversity as an economic artifact, which, per se is necessary for profitability and growth, especially in innovative product design and development.

KEY WORDS: ETHNIC
MARKETS
CONSUMER

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INTRODUCTION

INTRODUCTION ~~~~~

Economic estimates of consumer spending in Britain indicate a value of £72,600 million, for a population of the magnitude of 56 million, according to 1983 figures (Economic Trends, 1983). Given that the ethnic groups account for some 4 percent of the present consumer market (Social Trends, 1983), this implies that they could present a market opportunity of approximately £2,904 million.

Yet, the chimerical nature of ethnic differences has caused the concept of cultural market segmentation to be viewed with both skepticism and fascination by Western marketers. Despite advances in segmentation research, ethnic target markets have more often than not been classified in simple unidimensional terms, such as race, nationality or religion (Tamilia, 1976), which, while adequate for a rudimentary analysis, require in addition, more specific, in-depth information on ethnic belief structures, in order to be of use to marketing planners. Market research based on an application of the 'culture' concept remains therefore, a continuing challenge to consumer strategies in the years ahead.

The thesis here, investigates the extent to which ethnic decision-making is biased by cultural influences which provide the basic epistemological belief and value structures that make for differences in consumer market orientations.

In so doing, the study applies the basic guidelines used in the analysis of market segments, namely their 'measurability' in terms of the cultural characteristics that impinge on buyer behaviour, their 'accessibility' as it relates to effective focusing via media and sales strategies, and their 'substantiality' in terms of market segment size, for profitable targeting.

While an understanding of ethnic consumer behaviour places a stress on the application of Eastern psychology, the oriental mind has in the main been ignored as something mysterious. Nevertheless, sharp divergences arise from the cultural overlay that forms the foundation for ethnic and white consumer motivations. This derives directly from the mythological trappings of the various cultures in which ethnicity is expressed, as in the paradoxical Indian aphorisms which define the universe as a 'Void', pictured also in comparable form, as 'empty space welded into empty time', a four-dimensional picture of reality. This is similar to the conceptual formulation of the eternal 'Tao', described as 'namelessness' or 'nothingness', among the Chinese cultural groups, and again appears in the seemingly puzzling Japanese Zen riddles which ask to 'listen to the sound of one hand clapping' or 'soundless sound'. All these aspects have a wry element of humour associated with them, where it is impossible to ignore the strong feeling of some inexplicable meaning lurking behind the seeming nonsense.

Differences are mirrored yet again in the ethnic religions, which have largely evaded understanding within the Western cultural framework. This is found in the case of the extremely 'cohesive' religious structure of Muslim ethnic groups, or again in the Hindu worship of a pantheon of Gods and Goddesses in exaggerated form, to help the limited human mind experience and perceive something beyond its senses and mental abilities, as in the depiction of female cosmic energy in the 'eight-armed Goddess', suggesting how much better armed a person would be than with two arms. Thus, Younger and Younger, 1970 describe the Hindu religious structure as 'an enormous repository of myth making proclivities of the human race... not a repository of repressed elements..'. While Hindu cultural beliefs attempt to suggest an 'absolute reality beyond all pairs of opposites', the Chinese ethnic groups are more tempted to emphasise the essential polarity between object and subject. Together however, these various Asian cultural groups constitute a different dimension of human experience, with a lively appreciation of nuances and subtleties which the more Western oriented cultural groups ignore. Thus Riencourt, 1980 cogently describes the Western cultural framework as below:-

"The whole development of Western culture appears to be based on the setting up of sharp oppositions, which is then followed by an intellectual effort to reconcile these pairs-of-opposites through the medium of dialectics.." (p.134)

Remarking more specifically on the Western trend to

objectification, Riencourt, 1980 says:-
~~~~~

"Western cultural consciousness invests the object with all the trappings of reality. The object itself as 'that which is thrown against the subject', stands unalterably opposed to the subject as that which has to be mastered and overpowered by the Promethean ego... . With the result that Western man of today has filled his mind and the visible universe with an increasingly complex array of objects..." (p.55)

While such underlying constructs require exhaustive empirical examination in order to be useful, an interest in the issues of 'race' and 'ethnicity' as applied to the various ethnic groups in Britain, has been of relatively recent post-war II origin. The continuing controversy on race itself, has come to be defined as hinging on 'immigrant' numbers, and their threat to Western cultural and social patterns.

Investigations in a race relations context, began with enquiries on the West Indian ethnic groups (Glass, 1960; Patterson, 1963). Major attitudinal studies focusing on the incidence of prejudice and ethnocentric attitudes include among others, those by Banton, 1959, Daniel, 1968, and Smith, 1978. As the interest in race relations gathered momentum, research has been conducted on the influence of such social institutions as the mass media, their impact on dominant attitudes and opinions via the form and content of their output (Rose, 1969; Hartman and Husband, 1972; Hartmann, 1974), and more recently on the amount of race related material in news media content (Troyna, 1981).



Further to this, the thematic concern with the imperfect mechanisms operating in the inner city housing markets, has led to investigations on the concentration of ethnic groups in the lodging houses that mark the inner city rings (Rex and Moore, 1967; Rex and Tomlinson, 1979). Recent research (Anwar, 1978), also analyses the influence of chain migration and the multistranded kin relationships, as they have affected Asian ethnic settlement patterns. However, the exact nature of the forces making for the ethnic consumer market structure, or the entrepreneurial forces underlying it, has not been investigated. This was pointed out much earlier, in Rex and Moore's 1967 study, as below:-

"The boundary between patronage and entrepreneurial activity is hazy... How these types of relationship - kinship, political and economic overlap, is of crucial importance. The roles of patron and factional leader are often performed by men of property, shopkeepers, restaurateurs and so on, but we wait for further studies to amplify this, while concerning ourselves with the primary associations of the immigrant." (p.118)

Thus, many basic facts about the consumer behaviour of ethnic groups at the psychological level have been marred, more particularly due to the tendency among Western researchers to judge Eastern cultural groups entirely in terms of their economic poverty. This is not surprising, given that the racial and ethnic factors have been functioning alongside the simultaneous formation of sprawling urban city structures, where growth at the periphery has inevitably tended to generate decline at the centre.

The groundwork for research, as it relates to the 'ghetto marketing' problem, was provided entirely by American researchers, starting with Caplovitz's book, 'The Poor Pay More', in 1967, which emphasised the black market as a disadvantaged section by virtue of its race and geographic location. A total of 159 articles is recorded (Andreasen, 1978), as having appeared between 1960 and 1974, on topics dealing with black consumer behaviour, among them Marcus Alexis' early work on the spending behaviour of blacks and whites, and Henry A. Bullock's extensive analysis of 'Consumer motivations in Black and White'. However, it was not Caplovitz's treatise that was responsible for sparking off the rapid growth in interest in the problems of ghetto marketing, but the urban riots of the mid-sixties. The 'in' status of the topic was subsequently confirmed in several important publications during 1969, such as Sturdivant's 'The Ghetto Market Place', Cross's 'Black Capitalism', and especially Gibson's 'The \$30 Billion Negro', which showed that black consumers were a significant market segment with different tastes, shopping patterns and media preferences. The truths written in these earlier years were largely overshadowed, partly because of the riots, and more particularly due to the image of conflict portrayed via the adverse publicity carried by the media in both the American and British situations. Additionally, the negative stereotypes painted therein, helped to keep major marketers from considering ethnic consumers as segments. It is only

during the last decade, spurred by Gibson's, 1979 more recent  
book, '\$70 Billion in the Black', emphasising the growing  
force of the black segment, that marketers have begun to  
realise the need to communicate with the minority groups.

It is clear that so far as relevant urban research is  
concerned, relatively little contribution has been made to  
the major policy issues in the area. Significantly, while  
prevailing investigations have concentrated on examining the  
'primary associations' of ethnic groups, little effort has  
been made to conduct either simple 'factfinding', or more  
complex 'cause and effect' studies, on the patterns that make  
for the consumer behaviour and orientations within these  
groups.

Before ethnic groups can be considered for their potential as  
market segments, their existence would need to be considered  
in the light of the endurance of ethnicity itself as a  
persistent cultural artifact. Framed within this  
perspective, the thematic concern by ethnologists,  
sociologists and urban geographers, is shown to have its  
roots in studies concerned with the mass migration movements  
of a diversity of ethnic groups of European origin - German,  
Irish, Scandinavian, Norwegian, Polish and Jewish, among  
others - during the nineteenth and early twentieth centuries,  
in response to the building of industrial infrastructures in  
America and Britain. As an additional strand,  
industrialisation made colonisation possible, leading to the

Atlantic slave trade. Thus it is noted that for three and a half centuries, from 1502-1860, some 9.5 million Africans (Fogel and Engerman, 1974); were transported to supply the labor forces of the colonial West Indies and the Americas. Britain, as the dominant colonial power, formed part of this extremely lucrative trade, via the purchase of Negroes with British manufacturing, their transportation and sale to the colonial plantations where they produced 'sugar, tobacco and cotton for shipment to Britain, where in turn, new industries and ports such as Liverpool, grew up to process the raw materials' (Williams, 1966). The profits obtained, provided one of the mainstreams of the accumulation of capital which financed the industrial revolution. In this manner, while being the most advanced centre of production in the world at the time, Britain helped to preserve and extend plantation slavery in America.

Subsequently, changes in the plantation economy of the Southern United States, as well as the abolition of slavery following the Civil War, caused many Negroes to be pushed into the northern states of America, where they have subsequently been transformed into a segment of the urban working classes, thus contributing by their residential segregation, to the growth of black belts in the major city areas. Ironically, the demise of slavery caused large numbers of Asians from the Indian subcontinent, as well as Chinese and other oriental immigrants to be introduced into such areas of colonial subordination as British Guiana,

Trinidad, Natal (McKenzie, 1931), and from thereon via secondary migrations, into Britain, Canada and the United States, leading to the present day situations of multi-ethnic contact.

Assessments of the impact on these various ethnic groups, of the processes of modernisation, occupational diversification and the spread of mass public education, have resulted in the accumulation during the twentieth century, of a sizable body of literature by social scientists, analyzing the issues of race, ethnicity and society itself. Notable contributions include the epochal work of Gunnar Myrdal's 'American Dilemma' in 1944, along with theories on the future assimilation of ethnic groups, propounded by Robert Park, 1944 and Louis Wirth, 1945, Will Herberg, 1945, Milton Gordon, 1964, and Nathan Glazer and Daniel Moynihan, 1970; 1975. Two contradictory theories that have dominated the societal issues inherent in the contact of ethnic groups, are the 'melting pot' hypothesis, and the concept of 'cultural pluralism'. The 'melting pot' concept was coined by Israel Zangwell in a 1906 play, which bore it as a title reflecting the idea it embodied, that all nations would be shorn of their original characteristics and emerge as a newer and higher nation combining the best of the old. The second concept, that of 'cultural pluralism' was introduced in a series of articles by Horace M. Kallen in 1905, and ultimately collected in the book, 'Assimilation and Democracy'. The term 'a nation of nations', which revived

the concept of cultural pluralism, was introduced by Louis Adamic in a 1944 book of that title. Adamic suggested, in a number of publications, on the need for consciously maintaining the individuality of the ethnic groups, thus proposing an image of America in which differences were not only permissible but also a source of strength.

Over the years, the second generation 'ethnic minorities' are described as having become 'more Americanised in their attachments, fads and surface mannerisms than the Americans themselves', followed in the third generation, by a radical return to their ethnic and cultural roots, in a search for identity. In describing these 'classic national identifications', Glazer, 1954, asserted that '....it is impossible to deny their existence at the very least, as a vague nostalgia, an undefined terminology', which has every possibility of holding sway. More recently, the diverse ethnic identifications have been asserted to play an important role in the formulation of marketing strategies aimed at these groups.

In view of the above considerations, the central purpose of this thesis, was to conduct ethnic market research within an integrated framework covering the product, promotion and distribution dimensions, and to consider, furthermore, the implications of the ethnic demand structure as it affects marketing strategies.

The thesis is divided into four parts. Part I analyses the issues of market segmentation research as they relate to ethnic group differences. Part II describes the research methodology and assesses the ethnic demographic structure as it relates to strategies oriented to specific target markets. Part III continues with an investigation of the UK laundry detergent and automobile product markets with regard to the Asian and West Indian ethnic consumer segments. It further traces the impact of existing media, distribution and promotion policies as they affect the purchasing patterns of ethnic groups. Part IV examines the marketing and public policy implications of the ethnic demand structure.

In order to provide a basic framework against which to assess the concept of ethnic segmentation, Chapter 1 appraises the concept of ethnic marketing as it makes use of cultural constructs. Chapter 2 forwards the empirical arguments that make for the existence of ethnic differences on an 'a priori' basis.

Chapter 3 outlines the research design and methodology used in conducting the investigation. Chapter 4 examines the ethnic groups for their demographic and socio-economic structures, and projects future demographic changes, at a level comparable to that of the UK white consumer population.

Chapters 5 & 6 describe the ethnic segments with regard to the laundry detergent and automobile product-markets.

Chapters 7 & 8 ~~~~~ comparatively investigate the ethnic segments  
on media usage characteristics, and on their differential  
susceptibility to alternative advertising appeals,  
respectively. Chapter 9 ~~~~~ appraises the ethnic groups on the  
distribution and retailing dimensions.

Chapter 10 ~~~~~ discusses the implications of the ethnic demand  
structure and the ethnic economy, as they relate to marketing  
and public policy issues, particularly with regard to the  
inner city marketing structure. This is followed by a  
conclusive appraisal of the ethnic marketing structure as it  
exists within the UK consumer market.



**PART I**  
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CHAPTER 1
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**ETHNIC MARKETING AS A POLICY AREA**  
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CHAPTER 2
~~~~~

**THE RATIONALE FOR ETHNIC DIFFERENCES**  
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CHAPTER 1

ETHNIC MARKETING AS A POLICY AREA

INTRODUCTION

Ethnic marketing, as a policy area in the field of marketing strategy, has assumed increasing importance in targeting ethnic consumer segments over the past three decades. As the focus on the concept of market segmentation research has sharpened in the 1980's (Smith, 1956; Wind, 1978), the potential of ethnic consumers as a basis for segmentation, (Sexton, 1971; 1974; Sinha, 1977; Forkan, 1979; Green, 1979; Marsh, 1979; Jackson, 1979; Johnson, 1979; Smith, 1979; Wall, 1979), evidenced in the more obvious and tangible form of 'Ghetto' marketing (Andreasen, 1977; 1978; West 1979), has begun to be more critically assessed in view of its social relevance. The need for marketing strategy to broaden its purview to ethnic market segmentation, as it applies to the black market, has been expressed by Wall, 1979:-

"This is an era of marketing sophistication. Marketing directors, ad managers, and agency account executives talk knowingly of market segmentation, product penetration, imagery in advertising, demographics, psychographics, and other considerations in the 'marketing mix'.... Yet the practices of a generation ago persist when it comes to the black consumer market... They know that blacks are different, but miss the marketing implication and application of these differences."
(p.59)

This chapter argues in the sections below, that consumer behaviour can be visualised in terms of a complete set of variables which include the use of the 'culture' concept as it encompasses ethnic attitudes, beliefs and behaviour patterns. Differences ensuing from these variables are therefore of critical importance in providing a focus for marketing policies.

SECTION 1:1

ETHNIC CONSUMERS AS MARKET SEGMENTS

The concept of market segmentation attempts to define consumer categories, using as its basic criteria, the fundamental yet significant aspects of the 'measurability' of segments in terms of their purchasing characteristics, their 'accessibility' via media and retail strategies, and their 'substantiality' in terms of market size and growth potential. These facets underlie the modern marketing concept, that 'all planning starts with the consumer who holds the ultimate veto power'.

As a basis for segmentation, ethnic marketing constitutes a distinct decision of trying to gain competitive advantage for any particular product brand, by directing marketing efforts at subsets of consumers. It therefore aims at maximising demand selectively among ethnic market segments, due to the differential consumption of products and brands. This

implies direct variations arising due to the persistence of ethnic consumer tastes, needs, attitudes, motivations, lifestyles, preferences and cultural predispositions.

Segmentation itself, is not a new area in marketing research. In fact, there has been a proliferation of direct and indirect segmentation studies, all aimed at developing market segments with managerial, institutional and resource constraints. The roots of early market segmentation owe themselves to the acute and perceptive identification, by Wroe Alderson, 1958, of product differentiation and market segmentation as constituting alternative marketing strategies. The rationale determining the feasibility of the two strategies is explained thus: prior to the recognition of preference variations within a market, the key to profits was seen by business firms to lie in the development of a single brand, mass produced, mass distributed, and mass communicated. This would lead to the lowest costs and prices, and hence the largest market potential. With the increasingly competitive nature of selling strategies, there was a simultaneous drop in prices. However, this was also accompanied by a decrease in 'sellers' earnings. This has led, consequently, to the recognition of product differentiation as a means of commanding a premium in a market which is oriented to mass produced goods. But product differentiation by itself, leads to a 'sellers' rather than a 'buyers' market. To overcome this impasse, marketing strategy has been utilised as the guiding policy to serve as

a basis for product differentiation. This has brought about a clearer view of the interaction between marketing and product development costs, and their relation to marketing strategy selection. As a result, market segmentation has been envisaged by Smith, 1956 as:-

"...effective demand stemming from the presence of different 'market contours', where each distinct market contour or segment results not merely from purchasing power, but also from individual habits, needs and environment, thus giving rise to variations in demand. Markets thus become segmented because the common characteristics in groups of potential buyers result in not just one aggregate demand curve but in different demand curves, and in the creation of a heterogeneity of market appeals to supply different market segments." (p.3)

With the realisation of the practical importance of market segmentation and its potential benefits, (Roberts, 1961; Johnson, 1971; Engel, Fiorillo and Cayley, 1972), almost all the variables in the consumer behaviour literature, i.e., product purchase, product usage, brand loyalty (Frank, 1967), customer type (Frank, 1972), deal proneness (Blattberg, 1978), package size proneness (Granger and Billson, 1972), have at one time or another served as descriptors of consumer market segments (Yankelovich, 1964; Frank and Rao, 1971; Green and Wind, 1974; Wilkies and Cohen, 1977). Segmentation dimensions that have lent themselves easily to consumer classification and quantification have been demographics, social class, psychographics, followed by lifestyle patterns as measured by AIO (attitudes, interests and opinions) ratings (Rogers, 1961; Taylor, 1961; Martineau,

1963; Yankelovich, 1964; Rich and Jain, 1968; Lazer, 1963;
~~~~~  
Wells and Tigert, 1971; Cunningham and Crissy, 1972; Plummer,  
~~~~~  
1974).
~~~~~

Each of these dimensions has been an attempt at refinement, over the years, of the concept of market segmentation, in order to adjust to the increasing complexity of the marketing environment, and the rise of mass merchandising. Thus, social class (Martineau, 1958; Carman, 1965), for instance, has added more depth to the flat demographic statistics that have of themselves lacked richness and needed supplementation by other data. But socioeconomic characteristics, while partially useful for market segmentation purposes, have only provided crude aggregate product-brand preferences, and not been found sufficiently strong to take into account individual consumer preferences. Psychographic segmentation, (Koponen, 1960; Westfall, 1962; Kuehn, 1963; Yinger, 1963; Gotleib, 1958; Engel, Kollat and Blackwell, 1969; Kassarian, 1971), has therefore attempted to give more meaningful insights than can be obtained from social class data. Subsequently, lifestyle segmentation (Lazer, 1963, Rotzoll, 1967; Rich and Jain, 1968; Plummer, 1974; Green, 1977), has been used in marketing research in order to combine the supposed virtues of demographic data with the dimensionality obtained from the personality characteristics of consumers. Lifestyle patterning has been accordingly linked with product usage, magazine readership, television programme preferences and other mass communication variables



in order to provide typologies that delineate, as  
Plummer, 1974 has envisioned:-  
~~~~~

"... a broader, more three-dimensional view of
customers so that one can think about them more
intelligently in terms of the most relevant product
positioning, communication media, and promotion."
(p.34)

More recently, the investigation of consumer clusters on
relevant product attribute variables has led to the
elaboration of 'product benefit', 'need' and 'attitude'
segmentation designs (Bauer, 1964; Klaus, 1963; Bass, Tigert,
~~~~~  
and Lonsdale, 1968; Bass, Pessemier and Tigert, 1969, Twedt,  
~~~~~  
1969; Bass, Pessemier and Lehman, 1972; Beckwith and
~~~~~  
Sasieni, 1976; Blattberg, Buesing, Peacock and Sen, 1978;  
~~~~~  
Calantone and Sawyer, 1978). In all, however, a scattered
~~~~~  
research focus has evolved, and the major part of the  
publishable research is still devoted to a search for  
appropriate bases for defining market segments. It has also  
been recognised that many of the psychographic, socioeconomic  
and lifestyle variables prove of themselves to be of little  
significance in predicting viable product-marketing  
strategies, thus leading to the need for further refinement  
of the concept of market segmentation itself.

## SECTION 1:2

### ETHNIC MARKET SEGMENTATION IN AMERICA

Ethnic cultural differences constitute a criterion for segmentation, that has been found to overlap the existing segmentation bases of social class, demography, personality and lifestyle, that have been used frequently by marketers. As a clearer picture of ethnic preference variations has emerged over the 1970's and 1980's, American marketing literature has begun to recognize ethnicity as a pervasive factor in western society (Blauner, 1970; Hrabka and Grant, 1970; Novak, 1971). The existing literature on ethnic groups gives evidence of an established black-American market segment (Bauer and Cunningham, 1970; Burak, 1972; Barrie, 1974; Forkan, 1979), a sizeable Hispanic-American segment (Meyer, 1979), which is an obvious growth market projected to become the largest ethnic group by the year 1985 (Sondheim, 1979), the oriental Japanese-American segment (Light, 1972; Dalrymple, Robertson and Yoshino, 1972), and the Jewish-American market (Forkan, 1979; Jacobs, 1979; Rubin, 1979). Minority markets have also been identified in the American Italian, German, French, Polish, Greek, Arab, Asian, and the American Indian groups (Forkan, 1979). The ineffectiveness of the melting pot theories of assimilation, has proved, quite categorically, as indicated by Sondheim, 1979, that the US '....is a group of heterogenous markets rather than one homogenous market.' Forkan, 1979 has conveyed the magnitude



of the situation in the following terms:-

"All these segments constitute markets where total assimilation is far from being a reality... Most have protested against stereotyped images that have turned up in mass media ads and commercials."  
(p.12)

The most noticeable indicator that has been found to demarcate ethnic segments, is the 'heavy user' phenomenon (Burrows, 1979). This implies an existing disproportionate consumption of certain product categories arising from a combination of cultural, demographic and underlying motivational factors, as well as the inordinate preferences and loyalties that make for the success of particular brands within product groups. The 'heavy user' phenomenon, thus implies an imminent need for a consideration of distinctive 'marketing mix' combinations in order to reach these special markets.

The black consumer segment has, in addition, begun to represent an extremely lucrative market. Estimated to be the largest of the American ethnic markets at 11.4% of the US population in 1979, it was considered to have an annual disposable income that has doubled over the past decade from 30 billion dollars in 1969 (Gibson, 1969), to 74 billion dollars in 1979 (Forkan, 1979). In the past, the disadvantages operating due to the economics of the black market place, especially low consumer incomes, had caused black spending to be directed primarily to the basic consumer

necessities, comprising food, clothing, housing. The increase in the black median income during the 1970's, has caused black spending to be directed additionally, to the durable goods market, (Wall, 1970; 1974; Taylor, 1975; Dillingham, 1979; Glaxton, 1979; Mingo, 1979; Marticorena, 1979), making it, as Green, 1979 has emphasised, '.... the new frontier for industry', which marketers and advertisers have yet to cultivate and maximize directly.

A second major ethnic segment within the US consumer population is the 'Latino' Hispanic market (Anselmo, 1979; Forkan, 1979; Sanabria, 1979). Like the black market, the Hispanic segment is noted to be highly localised within Spanish-speaking neighbourhoods, requiring, in addition, a bilingual media strategy for effective communication (Anselmo, 1979; Cecilia-Mendez, 1979; Curran, 1979; Davis, 1979; Debellis, 1979; Dillon, 1979; Perez, 1979; Rosales, 1979; Shipley, 1979; Sofios, 1979; Sondheim, 1979; Tack, 1979; Zubizarreta, 1979). Distinguished from the general market by its Latino identity, linguistic and cultural nuances, all of which have been noted as important aspects which provide a key to the success of future campaigns aimed at this market, Sanabria, 1979 has described the Hispanic market thus:-

".... A market that thinks in Spanish, with a fierce loyalty to ethnic background, as opposed to complete assimilation into the American mainstream. The Latino identity.... is a cloak of protection, perhaps even disdain, against a country which has practically ignored the

existence of Hispanics." (p.21)

The Jewish segment is identified as yet another consumer submarket distinguished by a large circulation of Jewish publications (Forkan, 1979; Hrabá, 1978; Jacobs, 1979), and characteristically ethnic food consumption patterns. In a similar vein, evidence on the Japanese-American segment (Dalrymple, Robertson and Yoshino, 1972), has found it to be demarcated by differential consumption patterns and ethnic diet preferences, distinguishing it from both the black consumer market, as well as the general population.

Mass media campaigns, aimed at communicating with the ethnic markets, have occasionally though infrequently, targeted primarily the Italian, black, oriental Japanese, and also the American Indian groups, in an attempt to capitalise on their ethnic roots. The Italian image especially, has been the most visible on the American media front (Milton, 1958). Campaigns directed at these groups have found them to be prime target markets especially in the food and grocery categories. Thus, ethnic Jewish and Italian foods in particular, while targeted primarily at the core ethnic segments, have also expanded their appeal well into the general US market (Forkan, 1979), consequently broadening their sales potential well beyond the ethnic segments themselves.

### SECTION 1:3

#### ETHNIC GHETTO MARKETING IN THE INNER CITIES

The highly regionalised urban concentrations of the black-American (Maggard, 1971), and also the Hispanic-American ethnic markets (Paredes, 1979; Rodriguez, 1979; Tack, 1979), have been found to offer a unique marketing opportunity, in that merchandising efforts directed at these groups of consumers, can be simultaneously centralised and intensified with relatively little waste. However, the urban concentrations of ethnic groups have occurred mainly in what are the low-income ethnic areas (Caplovitz, 1967). Ethnic marketing has therefore assumed the proportions of a 'major social issue' in the fact that it has tended to become essentially a 'ghetto marketing' problem, focusing on the consumption characteristics of 'disadvantaged' inner city area consumers (Hill, 1971; Hiltz, 1971; Sexton, 1971).

The consumption problems of urban black consumers were first highlighted by Caplovitz, 1967, who described the inner city marketing system as 'a deviant one, in which unethical and illegal practices abound.'. Apart from these inner city problems faced by ethnic marketing, the early work on black consumer segments has used primarily the segmentation research tradition, testing for differences in the spending behaviour of black consumers (Evans, 1969; Marcus, 1969; Sawyer, 1962; Sexton, 1970; 1974), followed by an extensive

analysis of the consumer motivations that would explain the psychological differences in black consumption patterns (Bullock, 1961; Parke-Gibson, 1969), as well as the complex societal dilemma that is faced by the more affluent negro consumers (Bauer et al., 1965).

Only secondary interest has been expressed in the question of market disadvantage faced by the lower-income black consumers. The problems of the inner city ghetto marketing system have been highlighted adequately only in the urban American riots of the late 1960's, which indicated, as Andreasen, 1978 has expressed, that 'the marketing system was not performing its vaunted goal of improving the standard of living, at least as it affects the most disadvantaged consumers.'

Detailed investigations of inner city marketing policies by a number of researchers (Marcus, 1969; Caplovitz, 1967, Goodman, 1967; Cox, 1969; Allvine, Andreasen and Sturdivant, 1969; Andreasen, 1971, 1972, have been significant in suggesting that there are leading links between the problems of ghetto consumers, and minority economic development. Thus, the inner city consumer problems have been traced to the themes of small-scale marketing and high store-pricing policies. Black consumers, while significantly different in their tastes, media preferences and shopping patterns, have been found to simultaneously patronize what is a fragmented, archaic, marketing system, functioning at low volume, high

operating costs, insufficient capital and poor management.

A consideration of ethnic market dynamics in the inner city areas, further revealed that the frequent preference for traditional marketing institutions, such as peddlars and small neighbourhood stores, has put blacks in the hands of merchants who feel that they can be easily exploited (Caplovitz, 1967). The subsequent need for credit involves them in transactions requiring credit contracts, where the opportunity for exploitation is encouraged because of the major intervening factors such as high prices, high interest rates, deception and insolvency.

During the 1970's, the analysis of ethnic consumer segments shifted from the theme of ghetto marketing, to empirical research studies on the effects of using blacks in ads (Berkman, 1963), presumably in the attempt by marketers to communicate effectively with them. Despite this change in focus, however, the dynamics of the inner-city market structure still constitute an important and underlying aspect of the concept of ethnic marketing. Any consideration of ethnic segments, would therefore require a much better understanding not only of the fundamental black-white differences and of ethnic consumption characteristics, but also of the policy alternatives that must be considered, in order to improve the functioning of existing inner city retail operations and the ethnic market dynamics therein.

## SECTION 1:4

### THE ETHNIC COMMUNICATIONS PHENOMENON

Over the 1970's two areas of ethnic market research have been accorded repeated emphasis:-

1. Ethnic Consumer Motivations
2. Effective Ethnic Communication Strategies

The need for an intensive investigation of ethnic consumer motivations was first emphasised by Bullock, 1961, in an analysis of the black-American market, in which it was stressed that marketing research, in an attempt to explain consumer behaviour, should:-

"...bring into focus some of the basic motivations inherent in the collective psychologies of black and white; to show how these motivations express themselves in the consumer orientations and behaviour of those composing the two races."  
(p.91).

Although ethnic consumption preferences have been originally explained on the basis of demographic and income constraints, marketers have begun to realise that a more probing investigation is required in order to account for the full complexity of ethnic-white differences, (Wall, 1970; 1973), which would tend to discount the effectiveness of previously postulated 'melting pot' arguments. Thus, Maggard, 1971 has concluded:-

"Important though the selection of media may be, there is reason to believe that a lack of research in the area of black consumer motivation may constitute a more serious obstacle in preventing effective communication with this particular potential clientele." (p.80)

The collective psychological motivation making for a black ethnic market has also been emphasised by Johnson, 1964, in the following description of the Negro market:-

".....a general market defined by its exclusion from the white market. The Negro general market includes all special markets: teen-age, female, mass and class markets. There are Negro millionaires, Negro paupers, Negro Jews and Negro Catholics. What unites these groups is a common consciousness of a common past and a common future. Psychologically, geographically, socially and economically - the Negro market is a distinct reality with a definite character."  
(Advertising Age, 1964, Sep.21)

The market has been identified subsequently by researchers, in terms of its sociological background, its cultural history which is closely interlinked with the background elements of slavery and white domination, and an acute awareness of its 'African' heritage. This has been complicated by the seemingly enduring elements of a colour-caste system propagated within modern society. All these aspects have combined to produce variations in black-white consumer motivations that superimpose on the geographical concentration of black consumers. These variations have important connotations for marketing strategy related to product positioning and brand imagery, in the recognition



that, though the black segment is superficially united by a common consciousness, it is '... as segmented within as the general population...', leading to the existence of what Wall, 1979 has described as black 'eth-segments', with distinctive self-images, different from each other and also from the white market.

While marketers have, on the one hand, emphasised the disadvantages inherent in delimiting the black market by product differentiation built only around phenotypical and skin colour differences, they have concomitantly encouraged a policy of 'segmentation that would take advantage of differential preference patterns arising from black consumer tastes in ethnic food, music, language and the theatre.' (Forkan, 1979). Such a policy would have the added advantage of increasing specialised ethnic preferences while not detracting from the applicability of the general consumer market preferences, as they relate to the black segment. This would, moreover, have all the aspects of an optimal strategy, in that segmentation would only 'add value to some customers yet not detract value for other customers'.

In summing up the cultural differences that make for consumer motivations in the black, Hispanic and other ethnic markets, Gibson, 1979 has reiterated:-

"Social, cultural and psychological influences, as well as the projected growth in population and income, will continue to affect black and other minority consumers in the future. More study of

these consumer market segments will be needed for efficient market development. Marketing efforts targeted to black and Hispanic consumer segments will continue to be needed...". (p.34)

The need for a stress on research aimed at elucidating ethnic 'lifestyle' segmentation profiles in particular, has been indicated by Burrows, 1979 as follows:-  
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"What is needed in order to be effective and on target... is a comprehensive lifestyle profile of the black consumer. Attitudes, behaviour patterns, need states are changing into multidimensional values which must be assessed and monitored, in order to detect trends...." (p.18).

Again, as emphasised by Burrows, 1979:-
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".. the need for.. black consumer research expenditure based on brand share contribution by product category... cannot in these circumstances be ignored... Market researchers could then provide a solid information base, from which advertisers could develop on target strategy and relevant creative executions." (p.18)

Ethnic consumer research has thus begun to assume significance especially in view of the above facts, and their impact on the profitability of the product categories heavily consumed within the ethnic markets.

The second main aspect that has consistently been highlighted in recent years, is the need to communicate effectively 'with' rather than 'at' ethnic groups. The endurance of ethnic cultural differences has necessitated the utilisation

of different communication and media strategies, in order to profitably expedite the different selling approaches necessary for targeting the diverse ethnic segments. The situation is assessed by Maggard, 1971, in the following terms:-

"The Negro market can be described as a communications phenomenon in terms of consumers and business firms..... Furthermore, those firms who are experiencing a lack of success in efforts to reach this market are making some of their most serious mistakes in the selection of media, vehicles, message-design in promotional efforts." (p.72)

Yet, despite the above emphasis, what has been described as the 'benign neglect' (Sinha, 1977), of the ethnic segments by the Anglo-oriented white media, has also become increasingly apparent. The absence of effective ethnic agencies and media (Forkan, 1979), has also served to exacerbate the communications situation. The debate over the cost effectiveness of the general white-oriented media versus the more selective ethnic media, as well as of advertising research aimed at assessing the relative appeal of integrated advertising in comparison to segregated ad strategies, has therefore, only continued to remain unresolved. This controversy is described by Tack, 1979 as follows:-

"The main problem is that most advertisers do not recognise the potential of the minority consumer as a tremendous marketing opportunity, and so they are content with the marginal reach of the general marketing media." (p.22)

Adding to the complexity of the situation, is the fact that most 'anglo-oriented' advertising concepts have themselves remained suspect, and open to doubt in their general applicability to a host of diverse ethnic groups. This holds true especially for Western ad concepts that might have little or no meaning for ethnic groups (Sofios, 1979), or have not been found easily translatable from one linguistic structure to another. Johnson, 1979, a firm advocate of the 'special markets' concept, has summed up the present marketing situation, and the need for more effective ethnic communication strategies:-

"To the advertiser in search of an all-purpose medium, in the interest of media-efficiency..... the quest will remain elusive. It will also become more costly and inefficient as our dynamic markets become even more segmented and consumer demands continue to grow and change. At present I see no prospect of an all-purpose medium that works to the exclusion of black media." (p.25).

Given this background, effective ethnic communication remains an essential pre-requisite for understanding the ethnic consumer segments, that have not been sufficiently considered with regard to developing product strategies. A series of imprecise and unquestioned assumptions have, instead, only served to make marketers overlook the strategic implications and the meaningful application of ethnic differences.

## SECTION 1:5 ~~~~~

### ETHNIC MARKETING IN BRITAIN ~~~~~

Ethnic consumers in the UK have been considered essentially as a 'fringe' phenomenon (Khan, 1981). Their existence and proliferation as potential growth sectors within the domestic UK consumer market (Piper, 1977), has been given only marginal recognition and, that too, subject more to doubt and ambiguity among marketers, rather than any certainty.

This has been attributed (Piper, 1977), primarily to the noticeable lack of ethnic market research on an organised basis. Surprisingly enough, while the ethnic segments continue to remain ignored, British companies have for a number of years looked increasingly to the development of untapped foreign export markets, in order to maximise growth. The market pressures caused by increased foreign competition have also led to a search for alternative market strategies, designed to provide sustained growth through new product-market developments, especially in areas that are becoming 'no-growth' markets. Within this competitive environment, the ethnic markets constitute a 'domestic growth sector capable of absorbing consumer products and services in an economy that has begun to reach a saturation limit.'

Sizeable ethnic segments in the UK are the long established Jewish market and, more recently, the West Indian, Asian and oriental Chinese segments, all comprising a diverse host of

linguistic, nationality and religious ethnic groups. Ethnic food categories, in particular, have been noted (Rex, 1967; Piper, 1977), to constitute an important and growing 'import market', that exists to serve the ethnic dietary preferences of these segments. The potential profitability of the ethnic markets, and the benefits to be derived due to their cultural differences are stressed by Piper, 1977, as follows:-

"Cultural differences have made for a long list of products where ethnic group buying habits, preferences and attitudes are likely to be altogether different from those of the white population and therefore significant when assessing these markets." (p.19)

Although relatively few firms have made any attempt to approach these consumers with special ethnic formats, the possibility of establishing brand shares especially for products that are preferentially consumed by the ethnic segments, represents marketing opportunities that open new outlets for added sales.

To the extent that decisions regarding ethnic marketing strategies would impinge on the entire marketing and business environment in the UK, it is important that organised consumer research be conducted, in order to identify the cultural differences that need to be accounted for, in making finer adjustments in existing marketing strategies aimed at the ethnic consumer segments. Any such adjustments in product policy would in themselves be institutional within the marketing environment, in that they would affect the very

nature of change in the use of strategies based on new  
product development and innovation.

## SUMMARY AND CONCLUSIONS TO CHAPTER 1

The chapter pointed out that ethnic market segmentation as a policy directive, derives from an application of the 'marketing concept', which stresses the 'sovereignty' of the consumer, in applying the criteria of 'measurability', 'accessibility' and 'substantiality', to identify profitable target markets. Ethnic differences, as they arise from discrete cultural traits, are therefore recognised by marketers as critical in providing a substantive framework, within which to analyse the specific issues of ethnic product penetration.

The existence of sizable ethnic segments has been established, among others, in the case of the Black, Hispanic, Jewish, Chinese and Japanese ethnic groups, within the American consumer population. Significantly, the concept of 'ghetto marketing' has gathered momentum in recent years, given the substantial ethnic migrations into the inner city areas, which are simultaneously becoming zones of economic weakness and environmental deterioration.

More recently, the need to apply the 'special markets' concept, has also been identified in targeting ethnic groups in Britain, where the Asian, West Indian and Chinese markets in particular, constitute substantive segments within the consumer population.



Chapter 2 next attempts to give an insight into the dynamics  
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of ethnic differences, which, while subject to emergence and
change, will continue to be instrumental in paving the way
for future marketing strategies.

CHAPTER 2 ~~~~~

THE RATIONALE FOR ETHNIC DIFFERENCES ~~~~~

INTRODUCTION ~~~~~

Survey research highlights ethnicity, as a phenomenon that has come to be a persistent factor within society (Myrdal, 1944; Moynihan, 1944; Lieberman, 1963; Cohen, 1974; Hrabka, 1979), existing in diverse combinations of linguistic, religious and nationality groupings. It has been examined in existing studies, either with the aim of explaining ethnic self-determination in what are now considered 'plural' societies (Kurokawa, 1970; Glazer and Moynihan, 1971), or, alternately, in the context of intersocietal studies, based on comparisons of the forms of social organisation in ethnic home countries and the host societies (Gould, 1971). This chapter provides an overview of the rationales used for explaining ethnic differences within a historical context, ranging from the Darwinian and scientific debates that deluged Western society from the early 1830's (Cannon, 1978), to the continuing present day controversy over the existence of ethnicity in its several variations. A scientific perspective is essential to marketing planning, in order to make effective use of the culturally related factors that are crucial in profiling market segments.

SECTION 2:1 THE SCIENTIFIC BASIS OF ETHNIC DIFFERENCES

Ethnic differences have been recognised as inherently dynamic, defying attempts at any static and standardised formulation. Lyon, 1972 makes note of this evident lack of a common framework of reference or agreed meaning, as indicated below:-

"Historians combine ethnicity chronologically and in political terms; psychologists have focused upon ethnic identity and reference group allegiances from 'inside' and upon stereotypes from 'outside'; the other scientific disciplines have not considered ethnicity systematically because the topic is peripheral to their domain." (p.330)

Extant knowledge of ethnicity is therefore fragmented and partial, leaving it an elusive concept in spite of its intractable and particularistic nature. The situation further highlights the fact, that it is still necessary to explain ethnic differences on a more scientific basis than exists at present.

The concept of ethnicity can be traced back to the debate that began with Darwin in the 1830's (Reuter, 1945; King-Hele, 1963; Reingold, 1966; Cannon, 1978; Hraba, 1979), and was reinforced by the emerging scientific controversy (Morrell, 1971; Cannon, 1978), of the period. The ensuing conflict between the theories of 'romanticism' and 'science' began with the scientists, who could find no evidence of inherent virtue in man or matter. However, for the world in

the 18th, and the first quarter of the 19th centuries, the only rational belief was governed by the notions of 'romanticism', according to which all 'laws' were regularities of nature, an idea derived from the Stoics in Rome (Cannon, 1978), and that nature itself was unscientific, with only God as beneficent organiser. To support this theorizing, romanticism stressed the diversity of God's goodness, with 'nature' as the law-maker and law-breaker, and God as all-knowing and omniscient, and, therefore, the 'truth-complex'. Thus, as Cannon, 1978, (p.3) observes, '... Dante put man at the centre of the universe because the centre is a bad place to which all the dull matter and dross descends. The 'Devil' was also at the centre, and any direction up was good. The Church and clergy of the 19th century, also made much of the immensity of God's heavens.. '. The theology of the 1830's was proud of this liberality in explaining the concept of evolution in a general sense which was 'away from the Devil and towards God', without really explaining it at all.

Such 'romanticist' theorising, as it explained man's hopes and values, propagated the concept of several races, and the then prevalent belief in 'one favored race'. It was therefore in flat contradiction with what came to be classified as Darwinian nature, which postulated the existence of several variations within one race. Darwin's theory proposed (Barlow, 1958; Darwin, 1959; King-Hele, 1963; Reingold, 1966), that natural selection would result

in the existence of 'variations' within one racial species,
and not a species change...'. (Gruber, 1969; Burstyn, 1975;
~~~~~ Cannon, 1978). Consequently, Negroes could be explained as  
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'...not really a separate species of mankind but only a
separate variety...' (Cannon, 1978, p.277).
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With the publication of the 'Origin of Species', Darwin  
replaced the 18th century truth-complex with a new, entirely  
novel complex, which shattered the link between moral and  
material. It is important to remember in this context, that  
Darwin was personally stimulated by 'Romantic Christian  
notions', into proposing a system that would explain all of  
man's faculties on a materialistic basis. But even so, the  
theory of natural selection effectively drove out the  
romanticist notion of the truth-complex which indicated 'God  
as beneficent organiser, with matter itself only dull,  
stupid, corpuscular and only God to control it in the most  
benificent way.' As Cannon, 1978 states:-  
~~~~~

"Darwinian theory proved rather, that natural
selection was not intelligently organised and not
necessarily progressive. If anything, natural
selection appeared to operate in an unsettling
manner so that different racial groups are only
part of the same species, subject to the random
causes of genetic change..." (p.277)

Darwin's denunciation of the early romanticist theorizing was
supported by the Ethnological society of London, which, from
1948, dealt ostensibly with the reasons for the apparent
diversity of mankind, and attempted to investigate the

connection of the varied races in the entire British Empire, at a time when British imperialism was coming to the fore. The concern of the ethnological society was indicated in its denunciation, along with Darwin, of the slavery of Negroes, who were considered a separate racial species, and also in its condemnation of Western civilisation which seemed to show its intrinsic evil in having introduced and sanctioned a concept that allowed for the existence of several races, and, by extrapolation, the exploitation of blacks by whites. Evidence of this appears in Darwin's celebrated passage on slavery in his 'Autobiography' (p.74), and again in the 'Voyage of the Beagle' (p.480).

The stance taken by Darwin and the ethnologists was emphasised yet further, in the ensuing clash between the proponents of science, and those of theology. The scientists wanted some of God's attributes included in the scientific system itself, and to be able to justify God's attributes by observation and experiment rather than as part of an omniscient benevolence. The 'scientific' concept of the new stellar and nebular universe was therefore postulated to have no so-called 'wicked' centre. This was a direct attempt by the scientists to move divinity from theology into science, and thus to make morality itself scientifically secure. Consequently, while Science did not insist on abolishing moral feelings or conscience, it did disintegrate the elementary romanticist views of the truth complex.

The Darwinian debates let loose a series of immediately unpleasant arguments, and fights broke out all over the face of Science. To hush up the scandal implied in the suggestion of 'Darwinian nature', a number of Social Darwinisms sprang up, more ideological than scientific in their approach. These suggested that what Darwin did was to 'prove' the theory of evolution and 'propose' natural selection to account for it (Cannon, 1978). The theory could obviously be manipulated both ways. While the theists and Social Darwinists began to accept Darwinian evolution as 'God's way with organisms and therefore not really random, the antitheists and scientists began to emphasise the 'random causes of genetic change'. That vestiges of the ideology embodied in Social Darwinism, appear in later work in Park's assimilationist theory, are noted by Hraba, 1979, as below:-

"The authority of Darwin's work did stimulate the tendency to explain racial inequality (and hence racial variations) as an inevitable product of natural selection. ... In Park's work for instance, one finds the concepts of competition and conflict, reflecting the influence of Darwin on Park." (p.96)

Evolution itself, appears as a result of Darwin's clearing up.

As described by Cannon, 1978:-

"The basic new idea in Darwin's scheme, is that natural selection will produce new species; that, not evolution is the title of his book: 'On the Origin of the Species by Means of Natural Selection; Or, the Preservation of Favored Races in the Struggle for Life'.... Thus, Darwin corrected the theory of natural selection and with it, made

the inductive generalisation, evolution, plausible
for the first time." (p.277)

Within a post-Darwinian perspective, it can be deduced that since the variations among the diverse racial species could not be scientifically explained solely by factors such as climatic or geographic variations, what have subsequently been propounded as classifications of ethnic and racial differences between groups (Glazer and Moynihan, 1971), can, on a rational level, only be considered as several cultural variations within one racial species.

Support for the fact that ethnic differences are cultural rather than racial in content, can be plausibly extended on the basis of the following reasoning: given that 'intelligence' differences, as measured by IQ scores for ethnic and white groups, arise due to a combination of the 'heritability' and the 'environmental' factors (Jensen, 1969), then, assuming a situation where black ethnic groups are exposed to the same social environment as the dominant white group, the 'environmental' factor would not be significantly different. This implies that the differences between racial 'colour' groups are left to the 'heritability' or genetic component, which, however, can only be envisaged '...as a statistical concept related to blood types, so that the borderline between races may become blurred and hard to define...' (New Community, 1972, p.41).

In fact, even while criticising the exaggerated environmentalist bent taken by social and educational policy makers in the assumption of ethnic and white differences, Jensen, 1969 asserts that '...the predominant importance of ~~~~~ intelligence is derived not from any absolute criteria or God-given desiderata but from societal demands' (p.19), and, moreover, that 'it is not an unreasonable hypothesis that racial differences in mental abilities involve genetic as well as environmental and cultural factors... .' (p.461). On the basis of these arguments, therefore, it can be postulated that the differences between ethnic and white groups would stand the test of time mainly on the basis of cultural variations, these themselves arising due to a combination of the nationality, religious, and linguistic orientations, that define ethnic groups.

SECTION 2:2 ~~~~~

THE ASSIMILATIONIST PERSPECTIVE ON ETHNIC EVOLUTION ~~~~~

The assimilationist perspective on the evolution of ethnic groups, has arisen out of the larger Darwinian debate on the concept of evolution, and attempts to explain the concepts of ethnicity and race as sociocultural phenomena, related to the contact of peasant folk groups with the more modernised urban groups. It therefore moves altruistically, beyond simple biological analogies by analysing ethnic groups on the basis of social and cultural differences (Reuter, 1945). The ~~~~~

process of unilinear social evolution was initially formulated by Park, 1950 in the 'race-relations' cycle, which uses as its underlying principle the 'contact hypothesis', according to which race prejudice could be dissipated through human association (Myrdal, 1926; 1944; Wirth, 1945; Pettigrew, 1969; Zeul and Humphrey, 1971; Roper and Cohen, 1974). On this basis, the cycle envisaged that '... as folk groups move off the land, they come into contact with one another, challenge one another's prerogatives, and consequently compete for scarce resources.' (p.150). Eventually however, they would 'reach an accommodation and ultimately assimilate.'. Park thus recapitulated not only Darwin's 'struggle for survival', but also the laissez faire theory of economic liberalism. Similarly, Theodorson, 1960 has identified this behaviour as a contact propelled by the 'blind, impersonal forces of survival.' On this premise, conflict is envisaged as inherent in the process of change from an agrarian to an industrial society. Since the factors associated with assimilation are specific to societal modernisation, and hence to the spread of public education and the diversification of the occupational structure, it was believed that the large, resultant bureaucracies, functioning on the concept of 'impersonal welfare utilities', would replace the services rendered by the communal organisation of rural folk groups, and hence lead to the demise of ethnicity.

The race relations cycle, as described by Bogardus, 1930; Brown, 1934; Myrdal, 1944; Wirth, 1945; Park, 1950; Novak,

1971; Lyman, 1972; attempts to describe the breakdown of the
 older agrarian structures based on family ties, local
 associations, culture, caste and status, and explains their
 subsequent substitution in the modern industrial state by
 vocational human cooperation. It thus describes a new
 equilibrium to replace the earlier one. Within this context,
 ethnicity has been viewed as the survival of primary quasi-
 tribal loyalties, which can, however, only have a
 dysfunctional place in the achievement oriented, rational and
 impersonal social relations that define the industrialised
 bureaucratic order. Ethnic loyalty in such instances, can
 only be considered every bit as mechanical (Myrdal, 1944;
 Cox, 1945; Durkheim, 1947; Park, 1950; Ellison, 1964; Lyman,
 1972), as the impersonal struggle for survival. The social
 evolutionists envisioned that such mechanical loyalty will
 eventually be erased, with modern people relating to each
 other as commodities in the market place, each trying to
 maximize profit, so that human cooperation would finally
 replace conflict.

An important aspect of the evolution of ethnic groups is
 noted to be the intermediate development of ethnic 'ghettoes'
 in the urban areas (Park, 1950; Etzioni, 1959; Allen, 1971;
 Yancey, 1976). These have resulted due to the conglomeration
 of ethnic groups, initially as ecological and cultural
 entities, and continued their existence, as Wirth, 1945 has
 described, due to:-

"... racial segregation... which takes on the form of the usual class lines of a democratic society, or the castes of a stratified society." (p.273)

As a result the city has been described (Park, 1950), as having a '... high likelihood of resembling a collection of ethnic enclaves, each with its own ethnic population.' (p.579). It was argued by Park, 1950, however, that with the occupational diversification of ethnic folk groups, their economic class stratification and spatial dispersion within the industrialised cities, would cause the very basis of folk life to eventually disappear. The movement of groups out of the ethnic enclaves and into the suburbs is, therefore, postulated to lead to the eventual assimilation of a diversity of ethnic cultures and groups. The concept of assimilation thus implies, to a large extent, the assimilation of the encultured traits existing within the host society, and of the middle class style of life, its respectability, and entails further (Mill, 1951), the process of acquiring '....all those verbal skills and discretion involved in selling oneself in the great salesroom.'. These encultured traits are considered a vital aspect of the full assimilation of ethnic groups into a unitary society and, therefore, their so called cultural standardisation. Any persistence of ethnic differences has been dismissed under these circumstances, as merely transitional.

The assimilationist theory has been justified on the grounds that it finds a precedent in Marxian concepts (Hraba, 1979),

which argue that with the realisation of a utopian state, class conflict will end, and be replaced by a fraternity of workers, and hence by cooperation. Thus, the social evolutionists Durkheim, 1947; Zeul and Humphrey, 1971, Lyman, 1972, have all agreed with Marx in envisaging a set course of unilinear assimilation. However, they also argued that contrary to Marxian philosophy, class conflict can be avoided, and replaced instead by the functional interdependence which is inherent in the division of labour, so that specialisation would result in cooperative effort and organic solidarity, where the whole, or 'mass society', is greater than the parts, or 'ethnic groups', that constitute it.

The common consensus with regard to assimilation can be summed up in Hollingshead's, 1961 description:-

"Man as animal is organised competitively in the scheme of nature. But man as social being is organised cooperatively into groups through communication." (p.109); (p.258)

Vander Zanden, 1972 went further to describe assimilation as comprising of two components, 'integration' and 'acculturation'. While integration is defined as the process by which ethnic and racial groups are no longer segregated with regard to jobs, education and opportunities, the second component, acculturation, is taken to imply the process by which there occurs the ethnic and racial fusion of ethnic

groups into a common culture with regard to thought, feeling and sentiment. Within this overall context, Vander Zanden, ~~~~~ 1972 defines assimilation as:-
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"....the process by which diverse ways of thinking, feeling and acting become fused together into a common culture." (p.258)

Despite these views, it is expected that the pace of assimilation might be impeded (evolutionary divergence), or hastened (evolutionary convergence), depending on the biological and cultural differences between ethnic groups and the host society. Thus it has been argued (Myrdal, 1944; ~~~~~ Park, 1950; ~~~~~ Ellison, 1964; ~~~~~ Lyman, 1972; ~~~~~ Hrabá, 1979), that ~~~~~ when the combined cultural and biological traits are highly divergent from the dominant group, the process of assimilation will be '..slow and painful.'. On this basis, the racial visibility of blacks is described as an impediment existing in the process of assimilation into the dominant culture, 'but not in any case being able to reverse it' (Park, 1950, p.150). The above arguments in favor of ~~~~~ assimilation have convincingly contended that ethnic evolution itself, despite the possibilities of intervention by the presumably 'nonmechanical' attributes of the human communication between groups, is in any case, essentially a mechanical process, and that any deviation from it is only accidental. This mechanistic quality was elaborated in Gumpłowicz's 1899 imagery, before the start of the 20th ~~~~~ century, as below:-

"...The individual plays the part of a prism which receives rays, dissolves them according to fixed laws and lets them pass out in a predetermined direction and predetermined colour..." . (p.157)

Evolution within this perspective is likened to a 'great machine which moves towards assimilation inevitably and without purpose....' (Hraba, 1979, p.56), so that the differences between diverse ethnic groups would, with time, inexorably get submerged.

It must be contended, however, that this imagery in assimilation, and the theme of modern society as 'mass society', were shared in biology, psychology and all the social sciences in the 19th century. Therefore, concepts favouring assimilation were only buttressed by, and formed part of, the general sociology of the period.

### SECTION 2:3 THE PLURALIST PERSPECTIVE ON ETHNIC EVOLUTION

The assimilationist perspective, as outlined above, takes the stance that ethnic differences are the unnecessary survival of irrational folk loyalties and traditions, because of the differing rates of modernisation of ethnic groups within an industrial bureaucratic structure, and, therefore, eventually to be wiped out in the process of cultural assimilation. Contrary to this view, the course taken in the modernisation of ethnic folk groups has, since the post World War I

period, been found to proceed differently. Voluminous contributions to the ethnic literature on pluralism (Gardner and Gardner, 1941; Warner and Lunt, 1942; Warner and Low, 1947; Warner, 1949; Herberg, 1955, Gordon, 1964, 1970; Glazer and Moynihan, 1971; 1975), thus indicate that ethnic diversity is a phenomenon that characterises society, both, as '... the beginning and the end state', (Herberg, 1955, p.43), of modernisation.

This implies that, what was hitherto considered as the 'unilinear' and 'inevitable' convergence of ethnic groups in the process of evolution, is only a fictitious concept. Primary ethnic institutions will, rather, continue to be maintained as distinctive aspects of existing ethnic cultures, in addition to the acquisition by ethnic groups, of the encultured traits of the host society, for their necessary participation in the occupational structure.

The pluralist perspective on evolution is given appropriate expression, among others, by Etzioni, 1959; Rosenthal, 1960; Gordon, 1964; Herberg, 1965; Glazer and Moynihan, 1971, in the 'melting pot' hypothesis which advances the idea, that ethnic groups would eventually evolve into several melting pots rather than only one mass melting pot, as hypothesised by assimilationist theories. This has been illustrated with regard to the white ethnic groups - the American Poles, Italians, Greeks, and Slavs - who continue to remain, as Novak, 1971 has described, 'the unmeltable ethnics', (p.64).



To some extent, pluralism has been explained on the basis of the conflict theory, according to which the process of modernisation is accompanied by competition and conflict between ethnic groups and the dominant society. This results in the alteration, as well as persistence of ethnic diversity. Ethnic cultural variations, therefore, take on a number of new forms and expressions but do not really disappear. Accordingly, ethnicity is posited to be capable of existence outside the 'ghetto' (Etzioni, 1959, p.258), and as an integral part of modern society, a phenomenon that the assimilationist viewpoint did not consider.

Aspects that are consequently important to the existence of ethnic pluralism are the economic, political, social and psychological ramifications, all of which serve to differentiate ethnic groups. The existence of ethnic subeconomies in modern society (Bogardus, 1930; Etzioni; 1959, Gordon, 1964), as a facet of pluralism, thus serves an important function in reinforcing ethnic diversity. The primary motivational force underlying the simultaneous existence of ethnic economies and subsocieties, is described as ensuing from the 'consciousness of kind', and spirit of communalism that characterise ethnic networks. This was given structured expression in Etzioni's, 1959 description of the Jewish networks in the US:-

"There is a common identity, tradition, values and consciousness. Often there are common sentiments and interests based on past experience, education

and communication. The common bond is reinforced through ethnic newspapers, organisations, clubs and synagogues, where members meet even though they are not concentrated in one ecological area." (p.258)

The sense of historical continuity is also made evident in clothing styles, and through the commercial establishments and stores catering to ethnic requirements. Wirth, 1945 has further attested to the endurance of 'economic' ghettos among the Jewish ethnic groups in America:-

"...The ghetto's great outdoor market, full of colour, resembles a medieval European fair, more than the market of a great city of today. Its origins are to be sought in the traditions of the Jews - everything has value but the price is not fixed. The Jews became the dominant ethnic group in the ghetto by transplanting their own cultural traits." (p.232)

Suttles, 1968 gives a parallel description for the Italian ethnic groups in America:-

"Even in the commercial exchange between store owners and customers, ethnicity was evident. There were establishments that catered to only one ethnic group, and sold specifically ethnic products..." (p.51)

Guest and Weed, 1976 similarly account for these aspects of ethnicity, related to the rise in ethnic consciousness due to:-

"...the fact that ethnic groups may serve as political interest groups in the metropolis, and the possibility that residential ties on the basis

of ethnicity may counterbalance some of the less agreeable aspects of urban life...". (p.51)

The above accounts are consistent with Park's, 1950 explanation of the existence of ethnic enclaves as evolving urban entities, which undergo the dual phenomenon of elaboration into self sustaining internal collectivities, as well as differentiation into the various economic trades, functions, activities designed to meet ethnic needs from their own resources, and simultaneously, to perpetuate them as dynamically functioning subsystems. At the same time however, Park, 1950 regarded ethnic segregation as a temporary phenomenon and, therefore, only an intermediate step in the process to complete assimilation.

The formation of ethnic enclaves is explained as having arisen initially due to the concentration of ethnic groups around huge centralised factories and work-areas (Wirth, 1948, Homans, 1950; Kramer, 1970, Hechter, 1974; Collins, 1975; Yancey, Ericson and Juliani, 1976). The phenomenon of plural subsocieties is thus a distinct ecological adaptation of ethnic groups to the industrial work environment. The subsequent formation and persistence of ethnic enclaves, appears to have been reinforced by the voluntary choice to live within the ethnic community, and to overcome, moreover, the constraints imposed by ethnic linguistic barriers within the wider society. This results in, what has been described by Barth, 1969 as the formation of 'ethnic boundaries', due

to a process of incapsulation, further buttressed by verbal and nonverbal communication patterns, in order to reinforce ethnic identities. Cultural ghettoisation appears, therefore, to have created a demand for an ethnic identity which is sustained by '... a variety of formal and informal institutions...' (Handlin, 1973, p.152), and, necessarily, leading to the formation of economic substructures within the wider economy.

In this context, Shibutani and Kwan, 1965 have described the concentration of ethnic groups into particular industries, especially the merchandising, wholesale and retail trades, manufacturing and construction industries, and the mass communications and entertainment industries. This has been followed by a process of economic integration, by the provision of inexpensive labour from within ethnic groups, as well as the internal generation of capital. Such policies have, in the past, given groups such as the Japanese-Americans (Kitano, 1969; Light, 1972), and the Chinese-Americans (Lee, 1960; Yuan, 1976; Sexton, 1971), a competitive edge over other ethnic groups as well as over the dominant society, and, furthermore, served to emphasize the existence of ethnic economies as enclaves of plural enterprise.

The 'laissez-faire' theory of economic liberalism has, all along, provided support for the existence of ethnic subeconomies. It indicates that, the exchange between subgroups is propelled by the competitive forces of the

market place. Ethnic groups therefore compete in the city for jobs, housing and other material things of symbolic value (Broom and Selznik, 1963; Lenski, 1966; Newman, 1970). Ethnic ghettos are formed within the inner city economic framework (Williams, 1964; Kramer, 1970; Hrabka and Siegman, 1974), and, continue to be propagated by the binding characteristics of ethnic in-group solidarity.

Pluralism as an ethnic phenomenon has been additionally elaborated, into the two major dimensions of 'structural' and 'cultural' pluralism (Bogardus, 1930; Gordon, 1964; Rosenthal, 1960). While structural pluralism is explained as manifesting itself in circumscribed social participation and ecological ghetto formation, cultural pluralism superimposes on the structural aspect, and enhances ethnic cultures by the way in which these groups 'think, feel and act.' (Gordon, 1964). This latter aspect continued to provide the groundwork for the evolution of diverse nationality groups into larger networks, formed by commonalities in the religious groupings.

Religious pluralism (Lenski, 1963; Herberg, 1964; Glazer and Moynihan, 1971), has thus been described by Herberg, 1964 as follows:-

"As ethnic identity needs are displaced from nationality to religious groups, a state of religious pluralism evolves. The ethnic group in its older nationality form becomes less intelligible and relevant to reality. The old

ethnic religion continues to serve where language and culture cannot." (p.101)

Ethnic linguistic identities have been used, in addition to religion, to differentiate as well as bolster the confidence of ethnic groups (Giles and St Jaques, 1981). That language plays an important role in shaping ethnic cultures, is evident in its description by Shibutani and Kwan, 1965, as the 'instrument through which all other aspects of the culture are seen.'

Religious and linguistic variations thus serve as the essential forces behind ethnic pluralism, with religion itself, frequently acting as the causal factor in the maintenance of ethnic linguistic identities (Park, 1950; Allport, 1954; Bram, 1955; Yinger, 1963; Gordon, 1964; Fishman, 1966). Here, Schernerhorn, 1977 describes the nature of ethnic pluralism as it has emerged over the 1960's, due to the reinforcing effect of the three major features of language, religion and nationality:-

"The 1960's.... constitute a watershed of the 20th century.... Cultural pluralism and separatism capture the imagination of countless persons .... Minorities of every kind are now resonating to the claim of the right to be different...."

The continuing persistence of ethnic differences is now given explanation in the need for ethnic groups to develop and attain goals, without necessarily dissolving the binding

networks (Wagley and Harris, 1958), as was postulated in Park's, 1950 assimilationist theory. The phenomenon is therefore justified on the grounds that it leads to a worthier social arrangement, than that entailing the psychological costs associated with the structural dislocation implied in the dissolution of ethnic loyalties within the urban economic framework. That there is a simultaneous alteration and persistence of ethnic diversity in the second generations of urban ethnic groups, has been noted as a recurring and persistent factor (Patterson, 1963), in modern society. It is accompanied by a deviation from what might be considered as traditional regimental ethnic values, but simultaneously evinces a marked absence in adopting western norms in their entirety. This has resulted in the perseverance of ethnic identities in altered, but considerably more liberal forms, within the impersonalised yet more competitive urban bureaucratic structure.

At an underlying political level, ethnic cultural differences have been explained on the fact that 'people', 'cultures' and 'territorial political authority' very rarely coincide (Wirth, 1945; Wagley and Harris, 1958; Lyon, 1972; Chase, 1975). Wagley and Harris, 1958 describe the perseverance of ethnic differences in the following terms:-

"The very existence of the contradiction of terms known as the national state, especially where vast multi-national empires have dissolved rapidly, guarantees the proliferation of ethnic differences throughout the world." (p.242)

In this context, 'pluralism' itself has been described by Wagley and Harris, 1958 as '... a hegemonic accomplishment.'  
~~~~~  
(p.242). This is also evidenced in Lyon's, 1972 assertion:-
~~~~~

"....only since imperial states....developed a political organisation extensive and strong enough to bind together a number of different groups with different religions, languages, values and physical traits, have markedly contrasting 'types' of people become interrelated within single social units."  
(p.332)

Given the above evidence, it would have to be accepted that, as nation states acquire more modern, cosmopolitan forms, the diverse national and cultural backgrounds that make for ethnic differences, will become more entrenched in their entirety. The varying significance of language and religion as components of ethnic identity will, however, continue to remain ultimately complex, leading to the formation of ethno-religious groupings in some instances, and to ethno-linguistic groups in others.

#### SECTION 2:4 THE NEW ETHNICITY PERSPECTIVE ON EVOLUTION ~~~~~

The 'new ethnicity' perspective was forwarded during the 1970's, to explain the existence of ethnic differences as boundaries that are ostensibly psychological (Novak, 1971;  
~~~~~  
Bennett, 1975; DeVos, 1975; Despres, 1975), rather than
~~~~~  
territorial in nature. It was argued that Wirth's 1945  
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conceptualisation of the phenomenon of pluralist societies, was not sufficient in explaining the existence of ethnic subcultures, and did not attest to their endurance in the third and later generations of ethnic groups, especially when applied to their existence outside ecological ghettos. The 'new ethnicity' perspective was therefore forwarded, to explain ethnicity as a phenomenon not necessarily manifest in the territorial isolation of ethnic groups, or even in the formation of associated ethnic subeconomies.

The persistence of ethnic differences has been explained, rather, by new and more inclusive definitions which describe ethnicity, not as a mechanical concept, but more explicitly as a cognitive category that is manifest in distinctive patterns of thought, sentiment and action that serve to distinguish ethnic groups (Schermerhorn, 1977). Using this underlying framework, Etzioni, 1959 has described ethnicity as follows:-

"The new ethnicity is a state of mind, which is manifested more as the subjective symbolic use of an aspect of culture which differentiates ethnic groups from others.... It is a tendency towards human agnosticism, that the rise in ethnic consciousness may counterbalance some of the more disagreeable aspects..." (p.257)

On the above grounds, the 'new ethnicity' is described as a source of psychological identity (Barth, 1969; Levine and Campbell, 1972; Bennett, 1975; Despres, 1975; DeVos, 1975), which entails, as Novak, 1977 has elucidated, 'a sense of

discomfort with the universalist ideas of 'melted', and 'like everyone else', along with a simultaneously 'growing appreciation among ethnic groups, for the potential wisdom of their own historical roots', (p.8).

The manifestation of the 'group identity' has been elaborated by Barth, 1969, as a process enhanced by the voluntary incapsulation of ethnic groups, but, nonetheless, subject to manipulation due to its ecological localisation, because it entails the process of self ascription as well as ascription by others. Even so, group identification is reinforced in the process (Crissman, 1967), since it involves the 'psychological reduction of the group into a whole because of the presence of similar characteristics.'. Barth, 1969 has described the situation thus:-

"The distinction between ethnic groups is maintained through ethnic boundaries which are manifested through ethnically distinct patterns of thought and sentiment, circumscribed social participation and territorial segregation." (p.27)

Novak, 1977 has lately emphasised the psychological 'self', in comparison to the 'group', in the following terms:-

"A source of psychological identity.... so that it does not entail... living in a tight knit neighbourhoods or within the support of a subculture which reinforces differences through the use of ethnic national or linguistic appeals." (p.8)

The above definition corroborates Bennett's, 1975 earlier explanation as '...a search for the self through a general state of consciousness.' (p.3). In the light of such definitions, ethnic differences can be considered as arising from the heavy impact of the 'group' identity, but more specifically, as an attempt to recognise the 'self' within the group. Such differences are very likely to lead, eventually, to the evolutionary divergence of ethnic groups, especially in the case of cultures flowing away from the evolutionary trend of the dominant host societies.

Yancey, Ericson and Juliani, 1976 elaborated on the new ethnicity perspective, by arguing that while geographical localisation leads eventually to a 'sociocentric' form of ethnicity, with the persistence of isolated ethnic subcultures, it is gradually replaced with a more 'egocentric' form, due to declining isolation, and a dispersion of ethnic groups into the suburbs over time. The 'egocentric' phenomenon is more psychological than territorial in its orientation, and therefore implies not only the survival of ethnicity, but also its gradual evolution into more inclusive forms.

That the 'new ethnicity' concept simultaneously serves an economic function, is voiced by Bennett, 1975, in the assertion that it is:-

"... The proclivity of people to seize on the

traditional cultural symbols as a definition of their own identity - either to assert the self over and above the impersonal state, or to obtain the resources one needs to survive and consume at the desired level." (p.3)

A similar implication can be derived from the statement by DeVos, 1975 that ethnicity connotes 'making use of the subjective symbolic or emblematic use of any aspect of culture in order to differentiate themselves from other groups', (p.16). The process of modernisation, therefore, quite paradoxically, allows ethnicity to be expressed much more voluntarily and in several diverse ways, rather than be eclipsed, as originally hypothesised by the proponents of the assimilationist theory. In a triple consideration of the 'assimilationist', 'pluralist', and the 'new ethnicity' perspectives, it has to be granted that the mechanical metaphor found in the assimilationist concepts of evolution was fused with science in Newton's concept of the universe as a great machine (Matson, 1966). Subsequently, however, the psychological perspective found support and further refinement through the works of the contemporary physicists, Bohr, Heisenberg, Einstein, and Plank (Matson, 1966), which had the effect of causing the mechanical motif of the world and, therefore, of ethnic groups, to crumble. That ethnicity is ultimately a dynamic phenomenon, subject to change, has been summed up by Hrabá, 1979:-

"Ethnic groups..... are self-conscious entities who on the basis of a common origin, a separate sub-culture, maintain a distinction between themselves

and outsiders... and who move through time and consider how the ways in which they manifest their ethnicity may change as they do." (p.28)

SECTION 2:5

ETHNIC STRATIFICATION AND ITS IMPACT ON THE WIDER SOCIETY

An extensive system of ethnic stratification is recorded as existing within the social structure in the US (Davis and Dollard, 1940; Warner, 1949; Park, 1950; Lyman, 1972), and also in the UK (Daniel, 1968; Rex, 1967; Lyon, 1972; Allen, 1973; Tambs-Lyche, 1975). The uniqueness of the stratification in both cases, lies in the fact that it has been likened to the 'seemingly everlasting caste system of India' (Berreman, 1960; Hrabá, 1979, p.51). In this context, it was argued by Park, 1950 that the existence of the caste-like structure is a majority-minority phenomenon, contingent on the societal structure in which evolution takes place. On the basis of this proposition it was asserted (Warner, 1949), that when the external factors and cultural dissimilarities - linguistic, religious, as well as phenotypical colour differences - of ethnic groups are highly divergent, then race relations can terminate in a caste-like system. The proposition was applied particularly to the case of black Negro groups in America (Davis, Gardner and Gardner, 1941; Warner and Lunt, 1941; Warner and Srole, 1945; Warner and Low, 1947; Warner, 1949; Berreman, 1960). This situation is reaffirmed by Davis and Dollard, 1940, for the

social stratification of American negroes:-

"There is a system of white and Negro castes, and also a system of social classes within each caste, further stratifying groups. So that blacks are enclosed in a racial caste and do not seem to advance beyond the colour barrier." (p.12)

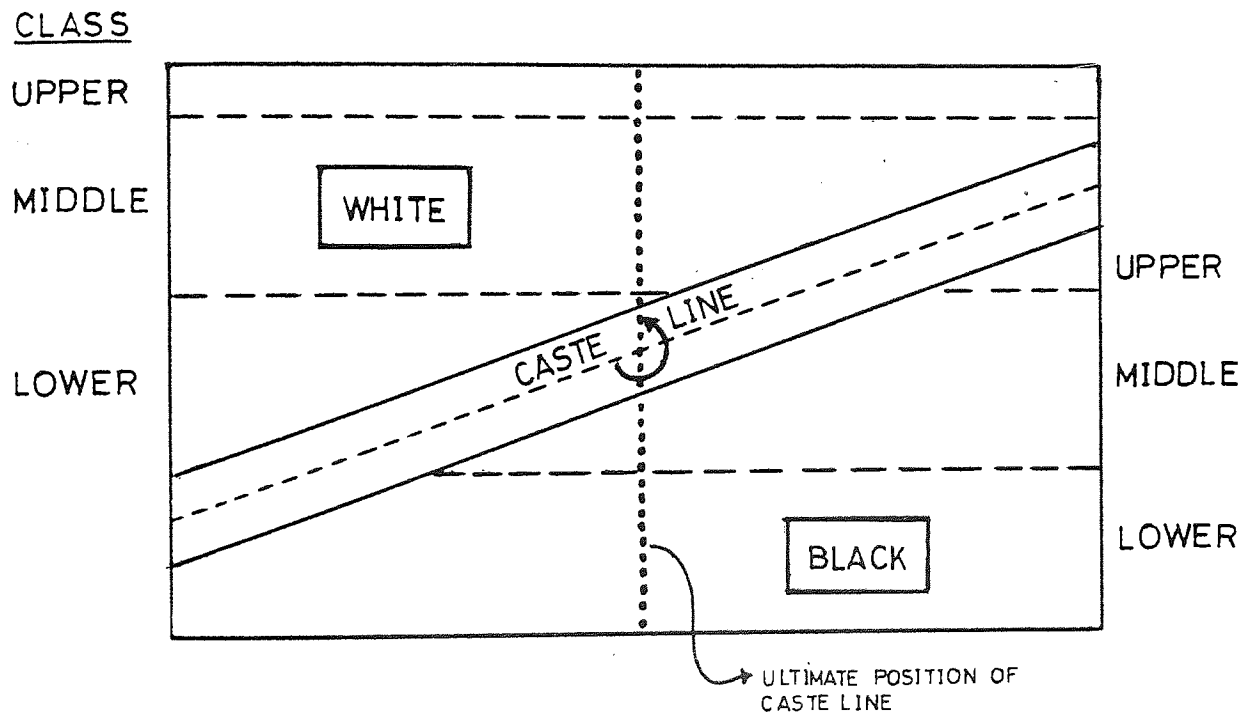
Ethnic-colour-stratification is described in Warner's, 1949
~~~~~  
scheme, as described in Figure 2:1 overleaf.  
~~~~~

The scheme allowed for discontinuing the earlier convention of a natural, inevitable and completely deterministic course towards white assimilation. It has served to indicate, also, that the social mobility of blacks is confined by the 'colour' constraint, so that blacks can rise to the upper classes primarily within their own racial group. As a result, the black 'upper class' group was revealed by Warner to be roughly equivalent only to the white 'middle class', in social status.

In this context, it was argued that ethnic stratification is only an instance of social stratification and results 'directly from the power of one party to dominate others in the course of their competition...' (Dollard, 1957).
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FIGURE 2:1  
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WARNER'S COLOR-CASTE STRATIFICATION
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SOURCE: Davis, A., Gardner, B.B. & Gardner, M.R., Deep South,  
University of Chicago Press, 1941

The competition thesis has accordingly been used to support the ethnic caste model (Becker, 1951; Lenski, 1966).  
~~~~~  
Thus, Hraba, 1979 describes how the caste model is related to, and perpetuated by ethnic and racial segregation:-

"..Traditional society was pastoral, had little manufacturing, and was based on a simple division of labour, and characterised by extreme ethnic stratification and rigid racial caste systems. Social mobility for subordinate groups was virtually impossible.. . With Industrial capitalism, a complex division of labour, and the greater opportunity for social mobility, ethnic relations become competitive... As people from different racial and ethnic groups compete openly in modern society, intergroup hostility is exacerbated. Segregation in such circumstances, averts constant conflict." (p.87)

Ethnic stratification has further been supported by Bonacich, 1972, on the capitalist grounds that allow for a 'labor caste system':-

"...The motive of capital is to employ the cheapest and most tractable labor groups, regardless of race or ethnicity... ..leading to a split-labor market. ... The class interests of the system, lie in the inclusion of the cheaper minority labor in the labor groups. This interpretation of caste contrasts with the Marxist argument that the capitalist class purposefully plays off one segment of the working class against the other..." (p.557)

While ethnic competition is consistent with Weber's 1949 model of society, as based on 'class, status and power', it has also been found to result in ethnocentric tendencies (Blalock, 1967; Barth and Noel, 1968; Noel, 1968; Kinlock, 1974). The variables that make for ethnic stratification,

are thus summed up by Barth and Noel, 1975:-
~~~~~

"..Ethnocentrism, competition, and relative power  
... constitute variables which are necessary and  
sufficient to explain the emergence of ethnic  
stratification." (p.345)

The net result is that racial stratification has taken on the  
appearance of '... a hereditary, institutionalised form of  
exploitation, with economic gains to whites', (Dollard, 1957)  
~~~~~

Linton, 1961 describes the situation with regard to the
~~~~~  
ethnic groups in the UK:-

"The British colonial code draws the most rigid  
color line of all. Paradoxically, the greatest  
colonizers in the world are the most provincial in  
their attitudes towards strange groups and  
cultures."

An important point to be noted here, is that explanations for  
the phenomenon of ethnic stratification have revolved around  
an inordinate and significant emphasis on 'colour'  
differences between ethnic groups and the host society. On  
the basis of the evidence provided by the West Indian groups  
in the British structure, and also the black Negro groups in  
the US, it appears that their social stratification has been  
understood primarily on the basis of colour differences.  
Consequently, degraded status and a lack of social mobility  
have been given support in the concept that black groups have  
lacked the cultural materials and content (Lyon, 1972), to  
~~~~~

assert affirmative ethnic identities which have, moreover, been subordinated to a large extent by the historical process of Negro slavery. The result is a weakly internalised, largely unintegrated ethnic culture, distracted by gradations of colour differences. In support of this view, Lowenthal, ~~~~~, 1946 has described the Caribbean culture of the West Indian ~~~~~ ethnic groups in the UK:-

"...It is essentially a variation of the Caribbean culture which attempts to conform to the pressure and dictates of the dominant white culture and the European styles of life which indicate improved status linked to colour shadings. (p.69)

That social stratification has overt racial, rather than ethnic connotations has also been clearly expressed by Lowenthal, 1946, as indicated:-
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"While ethnicity involves orders of distinction, with ethnic groups capable of coexisting, racial differences involve a social hierarchy graded by colour, making racial subordination and economic dependency complementary... Thus an ethnic group displays unique cultural characteristics such as language or religion, and unlike racial aggregates, has a clear sense of identity and cohesion, based on its cultural tradition." (p.92)

That religious differences, in particular, play an important part in differentiating ethnic cultural groups was described by Lyon, 1972, in the case of the British ethnic Asian ~~~~~ groups:-

"....Coincidental characteristics such as religion or race have been used so effectively, that it appears ethnicity is ranked per se." (p.334)

An important point generally ignored by sociologists, is that while the 'racial' colour concept has been used to categorise black-white differences within a broad societal framework, overtly religious, rather than 'color' variations have been used by the Asian ethnic groups themselves, for purposes of differentiation from the wider society. Notable in this context, is the fact that the 'caste' concept has been superimposed on religious differences, so that there is a high tendency for caste to override religion, and serve as the primary feature leading to segmentation. The result, as noted by Jayawardena, 1973, has been the existence of what can be classified as ethnic 'caste' groups, all aspiring to 'ideal' norms. Since caste is a psychological and spiritual categorisation that derives from religion (Desai, 1963), and acknowledged explicitly only within the Hindu ethnic religious groups, this has led to the existence of spiritual or 'caste' mobility, in contrast to the 'class' mobility that has characterised occidental racial groupings. That caste and religious orientations result in ethnic networks based on the need for significant others to refract back the 'sense of self', has been noted in the case of the British Asian groups (Erikson, 1959, Bottomley, 1973). Characteristically, Akram, 1975, in comparing the Asian and West Indian ethnic groups on differences in religious orientations, also indicated that, while ethnic Asian groups rely heavily on the

religious aspects of ethnic identity, the West Indian groups have been found to make use of an identity delineated primarily by an emerging 'black power' concept (Adler, 1965; Allen, 1970).  
~~~~~

Ethnic West Indian differences from the wider society, have therefore been considered essentially in terms of 'class', rather than any religious differences. The class inequalities between ethnic and white groups are further propagated by the maintenance of economic and social advantages, which are justified on the basis of a racial etiquette that considers black groups as inferior in status in comparison to whites. While this has implicitly involved a caste like structure to come into operation within the Western structural framework, it has, on the whole, continued to be ignored, without any political policies favoring preferential treatment for blacks to alleviate the phenomenon.

Paradoxically, since caste itself has religious as well as ostensibly spiritual overtones, (Desai, 1963), the caste-like demarcation acknowledged within the Asian ethnic groups has, also, caused the latter to assume economic control over their own ghettos to a very large extent, partly to minimise their economic dependence on the dominant white society to a very large extent. In contrast, the black-African groups are found (Blauner, 1970), to have remained controlled economically, politically and administratively by the host
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society, and, therefore, have not achieved the same measure of independence as the original white, or even the later Asian ethnic groups. This has been commented on by Hrabá, 1979, as below:-

"While white ethnic groups quickly assumed economic control over their own ghettos, blacks have not achieved this measure of self determination in their own ghettos at a comparable rate." (p.54)

Since caste lines would appear to cut across religion and colour lines, a consideration of ethnic stratification factors associated with the 'colour' variable, or, alternatively, with the 'religion' oriented caste variable, thus appears to indicate, that an extremely simple analogy of caste stratification has been applied to describe the condition of American as well as British ethnic groups. Taken together, the concepts of caste and religion serve to make the differences between ethnic groups a much more dynamic process (researcher's emphasis), than can be understood by present comparisons based on static formulations using variations in nationality, religion or language, or any single aspect by itself. These variables would therefore need to be reconsidered in greater detail, in order to adequately understand ethnic organisation within the societal framework.

## CONCLUSIONS TO CHAPTER 2

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In this chapter, the origin of the concept of ethnic differences was traced to the 19th century conflict between science and religion. It was shown how this was first highlighted via the Darwinian debates on evolution, which emphasised the existence of variations within one racial species, rather than several species. Ethnic differences were consequently considered as arising from discrete traits that are more 'cultural', than 'racial' in orientation.

Since the crux of the debate concerning the persistence of ethnic differences is related to the evolution of ethnic groups, this was postulated to take the following three forms, which vary in their relative emphasis:-

THE ASSIMILATIONIST PERSPECTIVE

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The assimilationist viewpoint emphasised the significance of the identity of the 'dominant' host group. It envisaged the assimilation of all ethnic groups eventually, into the dominant culture. According to this, the social evolution of ethnic groups caught up in the process of modernisation, implies a necessary merging of ethnic differences which are considered to be only the irrational remnants of ethnic folk identities.

The folk orientations allow for the existence of ethnic

loyalties to take on the role of moral obligations, which supersede bureaucratic rationality and are, therefore, a severe blow to efficiency. Since efficient bureaucratic institutional structures are necessary for the functioning of the impersonal, modernised industrial state, the assimilationist theory infers that the breakup of ethnic loyalties is not only inevitable, but also desirable.

#### THE PLURALIST PERSPECTIVE

The pluralist perspective stressed the importance of the 'group' identity. It maintained that this allows for the plural existence of ethnic groups within the societal framework in the form of highly structured, localised and close knit communities, which are insulated by the formation of ethnic enclaves. The formation of ethnic boundaries can be described as reinforcing ethnic identities, which take on the overtones of a psychological 'group' consciousness. Assimilation of ethnic groups over time, therefore, takes place into several melting pots, rather than only one melting pot. This perspective has been advanced as a means of ensuring minimal institutional dislocation for ethnic cultures, and thus for the existence of ethnic differences as a permanent facet of society.

#### THE NEW ETHNICITY PERSPECTIVE

The 'new ethnicity' perspective served to emphasise the

importance of the psychological 'self'. On this basis, ethnic differences were considered to be essentially psychological phenomena, which can exist outside geographical boundaries. Ethnic groups are described as 'bundles of propensities', that persist as egocentric expressions of ethnic identities. Ethnic segments consequently result as the products of commonalities in race, religion, culture, caste, nationality and linguistic orientations.

It was postulated that within this structure, ethnic stratification takes on a caste-like character which involves racial subordination, based on colour differences. Consequently, social mobility is circumscribed by the colour-line. In actual fact, the caste line, as indicated by its religious connotations, crosses the colour line. This implies that ethnic stratification based on a colour-caste combination is much more complex than the simplistic class concepts, based on colour differences, would imply.

Considering these perspectives within the modern consumer context, the existence of ethnic differences implies an emphasis on the psychological 'self' and 'group' identities that cannot be ignored, in view of their existence as dynamic vitalising forces. The perspectives themselves can only be regarded as complementary, and capable of providing merely partial explanations for the evolution of ethnic groups. The evolutionary convergence or divergence of these groups, would depend largely on the structure of the society in which they



occur. Thus evolutionary divergence could take on the elements either of social pathology or, alternatively, of ethnic communalism and the associated emergence with it, of self-sustaining ethnic sub-economies that ultimately play a vital role not only in the endurance of ethnic differences, but simultaneously provide a start for the proliferation of ethnic retailing units.

With the major metropolitan cities more segregated now than a decade back, it can be anticipated that the vast majority of ethnic consumers will continue to pursue ethnic lifestyles in the central city neighbourhoods. Keeping this in view, the chapters ahead will investigate their consumption differences, the more effectively to apply marketing strategies in targeting these special 'minority' segments.

## CONCLUSIONS TO PART I

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Part I of this thesis highlighted the fact, that even as the essence of contemporary ethnicity is its continuing capacity for self-realisation and transformation among ethnic groups, the 'ethnic' factor can be effectively utilised by marketers, in promoting business control with changing market trends.

However, the profiles of ethnic consumers have yet to be monitored, in order to detect future opportunities. At the same time, the competitive conditions of trading which characterize every market today, make it necessary to objectively evaluate the purchasing and consumer characteristics of the ethnic markets.

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Part II continues, with an application of market segmentation theory to the demographic structure of the UK Asian and West Indian ethnic target markets. Chapter 3 first outlines the research instrument and methodology used in the conduct of the survey. This is followed by a critical appraisal in Chapter 4, of the 'demographic' characteristics that direct the 'substantiality' criterion that was defined earlier on in Chapter 1, as it relates to the size and growth potential of market segments.

PART II  
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CHAPTER 3
~~~~~

ETHNIC RESEARCH DESIGN & METHODOLOGY

CHAPTER 4  
~~~~~

ETHNIC MARKET INTELLIGENCE

CHAPTER 3 ~~~~~

ETHNIC RESEARCH DESIGN & METHODOLOGY ~~~~~

The purpose in this chapter is to describe the methodological framework that was used in conducting the ethnic market research. The framework was designed to investigate the decision-making process of ethnic and white respondents within the UK consumer population, on the basis of the proposed null hypothesis:-

NH: 'Ethnic groups constitute market segments that are not significantly different, statistically, from white groups in their consumer decision-making.'

All aspects of the research methodology had a basic underlying consistency, in their aim of identifying ethnic consumers as targets that can be subject to market segmentation analysis, so as to make them more meaningful and actionable in terms of designing marketing strategies.

SECTION 3:1 THE CONSUMER POPULATION SURVEYED ~~~~~

Because the investigation was essentially a consumer survey, with the aim of distinguishing ethnic segments on the basis of their social and cultural characteristics as they impinge on marketing behaviour, the universe selected was restricted to the West Midlands Metropolitan District of Birmingham,

which is known to be an area of high ethnic concentration (National Dwelling and Housing Survey, 1979; Birmingham Abstracts, 1978). Thus, based on estimates from the National Dwelling and Housing Survey, 1979, it can be deduced that the West Midlands of itself, has a 16% concentration of the total ethnic consumer population that is dispersed over England. This corresponds to a figure of 342,000:2,110,000. In comparison, the spatial incidence for 'white' consumers is recorded as 11%, or a ratio of the order, West Midlands:England = 4,665,000:43,670,000 (Barber, 1981).

SECTION 3:2 THE SAMPLE DESIGN DEPLOYED

The approach adopted in arriving at the sample design, utilised the process of multistage sampling, with a sample of wards being selected at the first stage, and a sample of addresses within the chosen wards, at the second stage. The method of multistage sampling drew on the experience of government social survey investigations (Deakin, 1970), and also the political and economic planning (PEP) reports (Daniel, 1968; Smith, 1978). The 'variable sampling fraction' procedure was employed, to systematically select a sample of six wards. Thus, their probability of selection was proportionate to the size of the ethnic consumer population within each ward. Since the ethnic population is known to be unevenly distributed through the ward areas, this resulted in oversampling in those wards with a greater incidence of ethnic consumers, and undersampling those areas

with a lower concentration of these groups. The procedure thus had an element of inherent stratification via the 'cultural variability' factor, which is crucial in making for ethnic and white consumer market differences. It also minimised the sampling error that might arise from the cultural variability of the consumer populations 'between' ward areas, and left only the variation 'within' each ward area, to be accounted for. An equal number of consumers was then selected from each ward using the method of systematic sampling, thus achieving complete control over the selected sample.

A motivating consideration in the choice of the above method, was, that while it was judged impermissible to exclude entirely, the ward areas where ethnic consumers are only infrequently to be found, it was accepted that these wards might justifiably be undersampled and the others oversampled, in order to increase the overall efficiency of the sample design. Also, since the cultural characteristics of ethnic segments are more wholly reflected in areas where ethnic consumers are concentrated, the theoretically weak exclusion of the more dispersed ethnic population was not granted to have much practical significance.

The variable sampling fraction method is considered expedient, when it is evident that the population members are more mixed or variable with respect to the survey subject - in this case, cultural characteristics - in some groups than

in others. As this was an evident factor for consideration in the present survey, it was therefore more sensible to take a larger sampling fraction from the more variable ward area groupings, thereby optimising the overall precision. The use of the 'uniform sampling fraction' would, as an alternative, have given only a small proportion of the total sample from wards with a higher degree of cultural variation, so that probably no meaningful results could have been obtained for each ward area separately.

Alternative methods of sample selection such as 'cluster' sampling were not considered feasible, because though attractive in terms of time and cost resources (Yates, 1960; Cochran, 1963; Kish, 1965), a cluster sample would have had the disadvantage of quite possibly bypassing complete sections of the ethnic consumer population, and therefore not been representative of the ethnic market at a generalised level of statistical abstraction. 'Quota' sampling, alternatively, would have provided information significant in targeting selective subgroups of consumers, but again, not been representative of the ethnic market as a whole.

SECTION 3:3 ~~~~~

THE TECHNICAL DIFFICULTIES IN CONDUCTING ETHNIC SURVEYS ~~~~~

The previous sample surveys on ethnic groups, have brought together and highlighted virtually all the problems of survey methodology. The most obvious difficulty encountered, has been in finding a suitable sampling frame for these groups (Daniel, 1968; Deakin, 1970; Smith, 1978). There have also been many others, such as the language and interviewing techniques involved. Thus, the precise language matching of interviewers and respondents, has not always been found to have been achieved (Deakin, 1970). Official PEP (Political and Economic Planning), publications (Daniel, 1968), only serve to highlight the paucity of available information, due to the linguistic difficulties faced in communication with ethnic groups. Additionally, it is believed (Smith, 1978), that ethnic groups might be reluctant to give information to interviewers, due to the apprehension that it might be used to their disadvantage.

Some of the points that have come in for emphasis are:-

1. How could a statistically valid sample be achieved, amongst a group which does not appear to any large degree in the traditional sampling sources. On the basis of previous surveys, it is apparent that the most obvious source of information on the classification of ethnic

groups, till 1980, was the 1971 Census. However, a study of Census figures indicates that the information provided thereby, relates to a number of overlapping populations. First, there is a figure for 'all immigrants born in the New Commonwealth countries.' This includes a substantial fraction of the white population born in these countries (Rose, 1969). Second, there is no census figure which includes ethnic groups by virtue of their 'origin', that is, irrespective of 'place of birth'. This lack of information, would give rise to obvious statistical errors in any sampling procedure.

2. A study of ethnic groups in Britain, must provide valid coverage of a whole collection of ethnic linguistic, religious and nationality subgroups, which together form a very heterogenous universe, but have not been treated separately in Census data. Rather, the Census figure covers a population broadly classified as the 'NCWP' (New Commonwealth and Pakistan) population, and is therefore distinctly hybrid to be used with any clarity or precision. Under such circumstances, even if the scope of the investigation were restricted only to groups of Asian ethnic origin, the population under study would still have encompassed subgroups exhibiting regional and national variations.
3. How could full cooperation, i.e., high response rates, be expected from ethnic groups who are described as being

increasingly sensitive (Deakin, 1970), about the motives
~~~~~  
and rationale behind government and social surveys. In  
any investigation, therefore, it can be expected that  
there will almost invariably be a certain amount of  
intransigence on the part of ethnic groups in giving  
information, regardless of the interviewing technique  
utilised.

In view of these technicalities, the following points were  
considered as contributory of the unavoidable aspects of the  
sampling error in the present research:-

1. The ethnic population sizes used for purposes of ward  
stratification, were drawn from the Birmingham Small Area  
Statistics (1978), these being based on 1971 Census data.  
The ward population figures stood for 'all persons of NCWP  
(New Commonwealth and Pakistan) origin', indicating the  
inclusion of all persons of West Indian ethnic origin, as  
well as persons originating from the Indian subcontinent,  
other parts of Asia (Hongkong, Malaysia), and also those of  
Cypriot and Maltese origin. However, the sampling frames  
used for the extraction of Asian ethnic interview lists  
related only to the population with origins specifically from  
the Indian subcontinent. Consequently, it was accepted by  
the researcher, that the population figures used for ward  
selection (i.e., the primary sampling units), were larger  
than would have been the case, if more accurate data had been  
available.

2. The sampling frame included addresses of households, relating to the population subgroups originating from the Indian subcontinent, namely India, Pakistan and Bangladesh, as well as Asians from East Africa. Consequently only the lowest common denominator, namely their 'ethnic origin', could be used viably, in an assessment of differences in ethnic and white cultural characteristics. This was obviously biased by differences in orientation due to the confounding ethnic factors of nationality, religion and language.

3. Language translations of the questionnaire format were necessitated, in order to obtain the requisite information on different Asian linguistic sub-groups within the sample. The principal Asian languages used for interviewing, were Hindi/Urdu, Punjabi and Gujarati. While language matching was achieved in the majority of cases, there was still room for interviewee bias, and the occurrence of consequent 'non sampling' communication errors. The fact that communication and high response rates are related, has been pointed out by Argyle, 1973:-  
~~~~~

"It is found that the respondents willingness to cooperate and the content of answers both vary... It is sometimes the practice to alter the wording of questions for use with cultural minority groups, so as to make them of 'equivalent meaning'."

It must be noted that the total error arising in the data

analysis. would have been a function of the 'sampling error' arising from the sample design employed, as well as the 'non sampling' errors due to the questionnaire design and layout, interviewee bias, and the attitudes of the consumers surveyed. This can be reduced further in any ethnic research survey, only when these factors can be controlled simultaneously, by accounting for the diversity of language, religion and nationality orientations, in the population surveyed.

SECTION 3:4 DETERMINATION OF THE SAMPLE SIZE ~~~~~

The sample size was determined by using the hypothesis testing approach (Tull and Hawkins, 1979).
~~~~~

The 'Null Hypothesis' and the 'Alternate Hypothesis' were first stated, as follows:-

NH: 'There is no real difference in decision-making between ethnic and white consumers'.

AH: 'There is a significant difference in decision-making, between ethnic and white consumers'.

In order to decide on the sample size, the following assumptions were made with regard to the null hypothesis:

1. A confidence level of 95% was specified, for the null hypothesis to hold. This implied a level of significance of

5%, i.e., an assumed probability ' $\alpha$ ', of .05 for making a 'Type 1' or 'alpha risk' error, of wrongly rejecting the null hypothesis in the case of 5% of the samples drawn from the consumer population.

2. In order to apply statistical decision theory in testing sample proportions, it was hypothesised further, that a proportion of 90% of ethnic consumers ( $\pi_0 = .9$ ), were no different in decision-making from white consumers. It was argued that a failure of 10% of ethnic consumers to satisfy the marketing requirements under these conditions, would not seriously affect the sales profitability of consumer goods oriented to a white population.

The above assumptions for the null hypothesis led to the following specifications for an alternate hypothesis:-

1. A confidence level of 99% was specified, for the alternate hypothesis to hold. It was assumed that in this case, any future potential change in marketing strategy would require that ethnic consumers would be, in reality, different in 99% of the targeted population. This implied a level of significance of 1%, i.e., an assumed probability of .01 for making a 'Type 2' or 'beta risk' error, of wrongly rejecting the alternate hypothesis. A more stringent significance level was used in this latter case than for the 'null hypothesis' requirement, since it reflected the need to alter future marketing strategies targeting ethnic groups.

2. A proportion of less than 90% (i.e., 85% for instance),

of ethnic consumers, were no different in decision-making from white consumers. This implied that the proportion of ethnic consumers who were similar in decision-making to white consumers would not reach up to the 90% requirement, for the null hypothesis to hold. In other words, a difference in decision-making would be found to occur at the level of 90%,  
~~~~~  
for ethnic consumers.

Since the standard error, or Z_{α} value, associated with the Null Hypothesis at a confidence level of 95%, was 1.64 and similarly, that associated with the alternate hypothesis at a confidence level of 99%, was 2.33 (Statistical Tables, Tull and Hawkins, 1979), these assumptions allowed the 'Null'
~~~~~  
and 'Alternate' Hypotheses to proceed as follows:-

$$\text{NH: } \pi_0 = \pi_1$$

$$\text{AH: } \pi_0 \neq \pi_1$$

where ' $\pi_0$ ' = Proportion of ethnic consumers,  
and ' $\pi_1$ ' = Proportion of white consumers.

OR:  
~~~

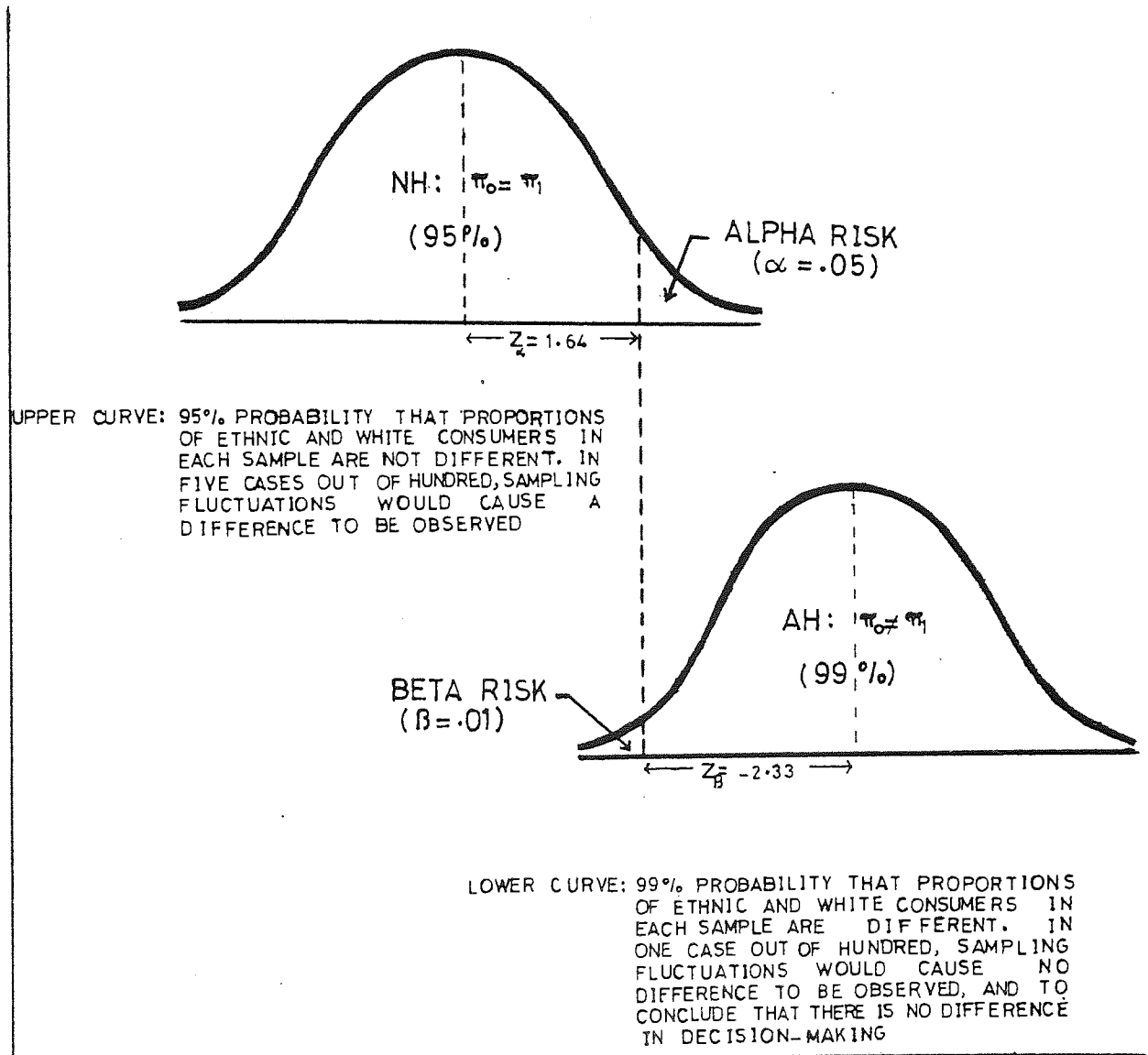
$$\text{NH: } \pi_0 = 0.90 = Z_{\alpha} = Z_{0.05} = 1.64$$

$$\text{AH: } \pi_1 = 0.85 = Z_{\beta} = Z_{0.01} = 2.33$$

The 'Null' and 'Alternate' Hypotheses are represented diagrammatically as shown in Figure 3:1 overleaf:-
~~~~~

FIGURE 3:1

DIAGRAMMATIC REPRESENTATION OF THE NULL HYPOTHESIS



SOURCE: Adapted from Green, P.E. and Tull, D.S., Research for Marketing Decisions, Englewood Cliffs, N.J.: Prentice Hall, 1978 p.228

The sample size 'n' was calculated from the 'formula for sample size determination involving proportions' (Green and Tull, 1978, p.231), as follows:-

$$n = \left[ \frac{Z_{\alpha} \sqrt{\pi_0(1-\pi_0)} + Z_{\beta} \sqrt{\pi_1(1-\pi_1)}}{\pi_1 - \pi_0} \right]^2$$

$$n = \left[ \frac{1.64 \sqrt{(.9 \times .1)} + 2.33 \sqrt{(.80 \times .20)}}{(.9 - .8)} \right]^2$$

$$n = [(.49 - .93) / (.9 - .8)]^2$$

$$n = (2.016) / (0.01)$$

$$n \approx 200$$

The above estimate gave a sample size of approximately 200 consumers, for the Asian ethnic group surveyed.

### SECTION 3:5 SAMPLE SELECTION

Samples of the ethnic and white consumer populations were drawn from independent sampling frames, for the geographical market areas considered. Since the purpose of the investigation was a comparative analysis, separate samples were considered to enhance the efficiency of the sampling design, and increase the overall precision of the market research.

Selection of ward areas as the 'primary sampling units', was made on the basis of figures on ethnic consumer population sizes listed in the Small Area Statistics (Birmingham



Abstracts, 1978). The 'secondary sampling units' were drawn  
~~~~~  
from sampling frames compiled from the electoral lists, 1976
(Research Unit on Ethnic Relations). Rating records were not
~~~~~  
considered feasible because this would have led to a lower  
degree of precision due to the simultaneous consideration of  
ethnic and white addresses, from the same sampling frame.

# 1. THE ASIAN ETHNIC SAMPLE ~~~~~

## STAGE 1: SELECTION OF WARDS ~~~~~

Having confirmed a desired sample size of 200 for the ethnic Asian segment, it was decided to select 6 metropolitan wards as the 'primary sampling units', in order to facilitate 35 interviews in each ward. This was inflated to a sample figure of 250, in order to allow for a non-response rate of 25%.

The 42 Birmingham District wards were listed in descending order, by ethnic population size. Against each ward, the number of persons constituting the ethnic group was noted, and these numbers were cumulated by successive additions throughout the list, (Table 3:1).  
~~~~~

A sampling interval was calculated, by dividing the total number of persons of ethnic origin by 6, i.e., by the number of wards to be sampled. A random starting number, smaller than the sampling interval was selected, and the ward whose

cumulated population interval included the above random number, was the first to be selected in the sample. The remaining five wards were then selected, by successive additions of the sampling interval to the random starting number.

This procedure gave as the selected wards, those of Handsworth, Sparkbrook, Smallheath, Saltley, Moseley and Ladywood (Appendix A.1), in order of decreasing ethnic population size, as indicated below:-

TOTAL ETHNIC POPULATION = 93,172

SAMPLING INTERVAL = $93,172/6 = 15,528$

| SELECTED WARDS
~~~~~ | CUMULATED POPULATION FIGURES
~~~~~
BY SUCCESSIVE ADDITIONS OF
~~~~~
SAMPLING INTERVAL TO
~~~~~
RANDOM STARTING NUMBER
~~~~~ |
|-------------------------|--|
| HANDSWORTH | 12,400 |
| SPARKBROOK | 27,928 |
| SMALLHEATH | 43,456 |
| SALTLEY | 58,984 |
| MOSELEY | 74,512 |
| LADY WOOD | 90,040 |

TABLE 3:1

BIRMINGHAM ETHNIC SAMPLE DATA BY WARD

| <u>WARD</u> | <u>ETHNIC
WARD
POPULATION</u> | <u>CUMULATED
WARD
POPULATION</u> |
|------------------|---------------------------------------|--|
| SOHO | 12,300 | 12,300 |
| HANDSWORTH | 8,928 | 21,228 |
| SPARKBROOK | 7,173 | 28,401 |
| SPARKHILL | 6,786 | 35,187 |
| SANDWELL | 5,785 | 40,972 |
| SMALLHEATH | 5,614 | 46,586 |
| DERITEND | 5,043 | 51,629 |
| ROTTON PARK | 4,930 | 56,559 |
| SALTLEY | 4,224 | 60,783 |
| ASTON | 4,120 | 64,903 |
| GRAVELLY HILL | 3,114 | 68,017 |
| EDGBASTON | 3,056 | 71,073 |
| ALL SAINTS | 2,609 | 73,682 |
| MOSELEY | 2,587 | 76,269 |
| WASHWOOD HEATH | 2,443 | 78,712 |
| NEW TOWN | 2,061 | 80,773 |
| DUDESTON | 2,042 | 82,815 |
| SELLY OAK | 1,040 | 83,855 |
| ACOCKS GREEN | 982 | 84,837 |
| HARBORNE | 839 | 85,676 |
| ERDINGTON | 691 | 86,367 |
| PERRY BARR | 638 | 87,005 |
| STOCKLAND GREEN | 552 | 87,557 |
| STECHFORD | 511 | 88,068 |
| HALL GREEN | 500 | 88,568 |
| KING'S NORTON | 457 | 89,025 |
| SHARD END | 432 | 89,457 |
| BRANDWOOD | 426 | 89,883 |
| LADY WOOD | 355 | 90,238 |
| LONG BRIDGE | 353 | 90,591 |
| FOX HOLLIES | 343 | 90,934 |
| NORTHFIELD | 279 | 91,213 |
| VESEY | 271 | 91,484 |
| WEOLEY | 265 | 91,749 |
| SHELDON | 251 | 92,000 |
| OSCOTT | 243 | 92,243 |
| YARDLEY | 204 | 92,447 |
| BILLESLEY | 181 | 92,627 |
| QUINTON | 179 | 92,806 |
| NEW HALL | 150 | 92,956 |
| FOUR OAKS | 120 | 93,076 |
| KINGSTANDING | 96 | 93,172 |
| TOTAL POPULATION | 93,172 | |

SOURCE: CENSUS OF POPULATION 1971, SMALL AREA STATISTICS

STAGE 11: SELECTION OF ADDRESSES

~~~~~

The second stage, required the selection of an equal number of interviews from each ward, thus restoring the equal probability of inclusion, for all households in the population. The method of systematic sampling was used to ensure an even spread over the ethnic consumer population.

The sampling frame comprised independent lists of household addresses by ward, within the Birmingham Metropolitan area. While the household as the unit of analysis was considered feasible on the basis of the appropriate sampling frame, it was anticipated that the information obtained would also be within the accepted degree of incongruency that surrounds product purchasing and product usage, since the ambiguity is recognised in the marketing literature (Engel, ~~~~ Kollat and Blackwell, 1973), as arising from anomalies ~~~~~ between purchasing and product consumption.

Within each ward, a sample of 40 ethnic addresses was drawn, again using the method of systematic sampling. The addresses compiled in this way were used for the consumer interviewing. Sample sizes of 40 per ward, were judged appropriate on administrative grounds, since this would allow them to be above the minimum value of  $n=30$ , necessary for the ward distributions to conform to the standard normal distributions

required for an accurate and reliable presentation of statistical estimates on ethnic consumers. It also allowed lee-way for any future inter-ward comparison of survey data, this being of potential use in designing market/shopping areas for consumer populations, based on their spatial distribution.

Moreover, the use of the quasi random samples as extracted above, permitted the projectability of results to the larger universe, and, thus allowed for the possibility of scientifically deduced generalisations on the differences between ethnic and white consumer behaviour.

This was felt necessary, because the majority of market segmentation studies are known, for the most part to have been based on quota samples, which, while convenient, are essentially small, non-representative samples (Wind, 1978).  
~~~~~  
It has therefore been difficult to draw generalisations from the several marketing and commercial studies on the exact effect of marketing variables on consumer behaviour and motivation. Because of these limitations, all that has been deduced from the current literature on consumer behaviour has been initial sets of hypotheses on 'likely' relations between marketing variables and consumer response (Wind, 1978).
~~~~~  
The generalizability test itself, has been largely ignored, in spite of the importance of ensuring that segmentation be conducted on reliable consumer data.

Despite the advantages of the survey method employed, it has to be granted that, though the ethnic Asian sample was large enough to be representative of the group on an overall basis, it contained subgroups of differing religious, nationality and linguistic orientations. These were of themselves not large enough to provide a definitive analysis on a subgroup basis. To take the investigation further, therefore, would require looking at the subgroups separately in a large scale survey, or alternatively, through the method of quota sampling.

(ii). THE CONTROL SAMPLE  
~~~~~

A control sample of 120 white households, was extracted from the electoral registers, 1982, these serving as the sampling frames for the appropriate ward areas covered, in order to facilitate a comparative analysis of ethnic and white consumer purchasing data. Since the aim was to analyse ethnic and white differences, from the ward areas that were, in the first instance, selected for the ethnic Asian sample, an average of 20 white household addresses was extracted per ward. The address lists were inflated to cover a sample size of 35 in each case, in order to allow for the comparatively high level of white non-response (42%), noted in the preliminary pilot study.

(iii). THE WEST INDIAN ETHNIC SAMPLE

The West Indian ethnic sample, comprised 22 sampling units that were drawn as part of the general white consumer sample. It was argued here, that, since the method of systematic sampling was used in the selection of the white sample, the procedure would by extension, also cover the West Indian ethnic group. The choice of the sample by this procedure, was necessitated by the notable absence of any suitable West Indian ethnic sampling frame, covering the ward areas sampled, and similar to that compiled for the Asian ethnic group (Research Unit On Ethnic Relations, 1976). Moreover, it was not considered possible to extract a list from the electoral registers, due to the ambiguity associated with names of White and West Indian ethnic origin. The White and West Indian samples therefore had associated with them a larger degree of sampling error, arising due to the higher element of between-group variability in the general consumer sample. Nevertheless, it was considered essential, as part of the market research, to analyse the West Indian ethnic segment in order to highlight any differences that may emerge, with regard to the segment characteristics of Asian and West Indian ethnic groups, which have, to date, been designated by the same 'umbrella' terminology (Patterson, 1963), as the 'NCWP (New Commonwealth and Pakistan) population', in Census data. This description has tended to mask any differences that might exist between the Asian and Caribbean groups, despite very obvious differences in religion, nationality and

linguistic orientations.

SECTION 3:6 THE INTERVIEWING TECHNIQUE UTILISED AND
~~~~~  
CONDUCT OF THE SURVEY  
~~~~~

The personal interview technique was utilised, for the sample data collection. The diary-based and postal questionnaire techniques were not considered appropriate, because, although more amenable in terms of cost and time constraints, it was anticipated that they would result in larger errors in the retrieval of information, due to the variety of cultural and linguistic subgroups covered. Ethnic linguistic variations would, moreover, have made communication through the written word much more ambiguous and doubtful, than personal interviewing. A 'structured' questionnaire was devised, because of the primary need for a concrete data base that can be aligned to data of a 'qualitative' nature using projective techniques, in more comprehensive diagnostic analyses of ethnic consumers.

A pilot survey, covering a sample of 25 households from the designated ward areas, was conducted during December 1980. The outcome was a questionnaire reduced in size, in order to minimise interviewee exhaustion and simultaneously optimise the response rates.

Interviews were subsequently conducted, over an interval including January 1981-June 1981. The total sample sizes

were of the magnitude, White:100, Asian ethnic:240, West Indian ethnic:22. Responses obtained for completed questionnaires were of the order, White:86, Asian ethnic:210, West Indian ethnic:22. Languages used for the purpose of interviewing varied depending on the subgroup covered, where a preponderance of the Punjabi linguistic subgroup was discovered with regard to the Asian ethnic sample.

SECTION 3:7 THE PRODUCT MARKETS INVESTIGATED

Product categories chosen to cover the analysis of ethnic consumer segments, reflected as assessment of:-

1. THE LAUNDRY DETERGENT MARKET
2. THE AUTOMOBILE MARKET

The rationale governing the product market research was as follows: the laundry detergent market covers a product category involving frequent purchase, a large variety in terms of brand choice, low outlay per purchase and largely 'repetitive', habitual decision making. In contrast automobiles constitute a product area entailing a large financial outlay and, consequently, high involvement in the decision-making process, along with purchases after extended periods of time, with decision choices based on a few dominant and well known car makes. Market research covering these two product areas, thus aimed at describing the

contrasting extremes that can occur, in shaping ethnic consumption patterns and decision making.

SECTION 3:8 MARKETING VARIABLES IN THE QUESTIONNAIRE DESIGN ~~~~~

The variables used in the questionnaire design, were selected so as to obtain consumer information with regard to the various aspects of product purchasing.

The ethnic factor served on an 'a priori' basis, as a descriptor of the ethnic and white consumer segments. The questionnaire items were then selected, according to the theory of segmentation which is based on the premise of differing consumer segment elasticities (Wind, 1978), to the marketing variables involved. It was postulated that these could then be used, to describe and differentiate between the ethnic and white consumer segments, in terms of the three conditions which serve as prerequisites to market segmentation strategies, namely:-

1. 'Measurability' of the segments, or, in other words their 'identifiability', on the basis of culturally related marketing and consumption behaviour variables.
2. Their 'accessibility', with regard to selectivity in communication and media usage characteristics.
3. Their 'substantiality', in terms of disproportionate product consumption, so as to profitably benefit the marketing mix.

The variables used in the questionnaire design were accordingly selected, to obtain market information with regard to:-

1. Ethnic product-brand purchasing
2. Ethnic media usage
3. Differential susceptibility to ethnic advertising appeals
4. Ethnic retail patronage patterns

The questionnaire items covering these four major issues, thus aimed at identifying the basic structure of ethnic consumer behaviour, within an integrated marketing framework consisting of the product, pricing, retailing and advertising dimensions.

(I). PRODUCT-BRAND CHOICE VARIABLES

The investigation of product purchasing patterns for ethnic and white consumers, involved a consideration of variables covering product usage, brand preference, sensitivity to product pricing, and consumer attitudes to the relative importance of product attributes (Warsaw, Azjen and Fishbein, 1973; Fishbein and Azjen, 1975).

The salient attribute lists were generated by the researcher in the first instance, via the unstructured, open-ended

questionnaire technique, on the initial pilot sample. These were then organised into structured questions, in order to be semantically meaningful. The generation of product attributes was necessitated by their need to reflect the perceptual dimensions of ethnic consumers rather than be controlled arbitrarily, on the basis of previous product marketing strategies. Five-point, bipolar likert scales were used for the measurement of attribute ratings ranging from 'very important' to 'very unimportant'. The mean ratings in each instance, gave an indication of the relative preferences for ethnic and white groups. The rationale behind expected segment differences in product-brand purchasing, was, that a product-brand is viewed as a bundle of attributes leading to costs and benefits of differential desirability to individual consumers, and segments, constituting the market (Wilkie and Pessemier, 1975). The overall choice was therefore posited to reflect the net resolution of individual cognitions and beliefs (Sheth, 1978; Bettman, 1979), so that the salience of each product attribute for the consumer would result in differential brand preferences. It was also argued that habitual brand loyalty on the part of consumers, represents an associated learning process under conditions of reward (Sewall, 1977), so that there would be a positive association between brand choice and previous brand purchases.

Given that marketing and promotion strategies could be used to control associated brand images at least to a certain

extent, an assessment of consumer decision-making with regard to functionally similar brand alternatives (Sewall, 1971), offered an approach to formulating important aspects of product strategy along ethnic segmentation dimensions.

(II). MEDIA USAGE VARIABLES

Information was obtained on media usage, for the print and broadcast media. This was compared with existing circulation and readership data, that is based on the Joint Industry Committee for National Readership Surveys (JICNARS), and the British Rate and Data (BRAD) reports. In this manner, it was hoped to investigate the ethnic groups for their selectivity in the use of communications media, and the impact on their marketing accessibility, via media promotion strategies.

(III). ADVERTISING VARIABLES

Ethnic and white consumers were tested for their differential susceptibility to alternative ad layouts, on the premise that differences in consumer cognitions would dictate attitudes to given ad-appeals. This was operationalised through four experimental ad treatments:-

- 1). The product with a White model ('White' Ad)
- 2). The product in an Integrated Panel Ad, consisting of the Asian ethnic and White models in separate panel layouts ('Integrated' Ad)
- 3). The product with an Asian Ethnic model ('Ethnic' Ad)

4). The product as the dominant principal in the ad
('Product-Only' Ad).
~~~~~

#### 1. PREPARATION OF ADVERTISEMENTS ~~~~~

Alternative promotional messages were designed, maintaining the product, ad-copy and ad-layout constant, and manipulating the models on the basis of the distinct cultural and ethnic characteristics of the groups concerned.

The picture of a well-known automobile was obtained from a popular magazine (Sunday Times Colour Supplement), and mounted on cardboard. Pictures of the ethnic and white models were also obtained, from recent mass market magazines. Care was taken to match the models on all aspects, as far as the search in currently circulated publications permitted. In order to minimise uncontrollable bias, confounding factors such as position of the models, were simultaneously controlled. This procedure aimed at enhancing the internal validity of the experimental design (Campbell and Stanley, 1963), so that the study could be replicated to give consistent results on subsequent samples.

Photographic prints of the model with the product were obtained in each case, to give the 'ethnic', and the 'white' model ads. These were then combined in a single print, to give a photographed version of the advertisement in an 'integrated' panel structure. In all three ads, the models



occupied the dominant position, since the purpose of the research experiment was to emphasise cultural differences in the ad appeals. The technique was consistent with previous research on the advertising effect of black and white models, where stimuli were constructed so as to focus primarily on the black model (Barban, 1969). The fourth experimental treatment was obtained by preparing an ad with the car as the dominant principal, so that emphasis was solely on the product being advertised. The photographic prints were mounted in each case on plastic covers so as to represent realistic, full page, black and white advertisements.

## 2. SUBJECTS FOR THE EXPERIMENTAL AD TREATMENTS

The four ad treatments were randomly assigned to the subjects in the Asian ethnic and White groups in each ward area. The scope of the experiment was more restricted for the West Indian ethnic group. In this case semantic ratings were obtained by a random rotation of only the 'white' and 'product-only' ads, as the ads with the Asian ethnic principal were not considered strictly applicable to this latter group. Since each subject was given only one ad treatment, the procedure had the effect of minimising response bias, and also of obtaining an equal number of responses from each ward sampled.

### 3. THE SCALING TECHNIQUE UTILISED FOR AD EVALUATIONS

The advertisements were evaluated through a rating sheet that contained 20 ad-oriented variables, focusing on the message communication of the ad. Each item was measured on a 7-point semantic differential rating scale. The items were adapted from previously conducted research on testing for ad effectiveness (Barban and Cundiff, 1964; Barban and Grunbaum, 1965; Barban, 1969; Stafford, Birdwell and Van Tassell, 1970; Cagley and Cardozo, 1971; Bush, Hair and Solomon, 1979; Baker, Gilbert and Churchill, 1977).

The item scales were designed so as to tap all three components (cognitive, affective and conative) of an attitude and, secondly, because they have been used successfully by companies in testing ad copy (Gilbert, 1977). It has been indicated in previous studies that these item pools were relatively homogenous, and strongly related to the total score of the component they were measuring.

In order to inhibit the emergence of a response set, the scales were alternated with respect to the position of the favorable and unfavorable poles. On each scale, subjects could indicate an evaluation ranging from '1' (least favorable), to '7' (most favorable).

In comparison to earlier advertising research, these ad profiles were constructed on larger item pools than have been



used, to date, to investigate ethnic-white differences. Earlier studies have limited black-white comparisons to the evaluation of advertisements on four common scales 'beautiful-ugly', 'good-bad', 'friendly-unfriendly' and 'for me-not for me'. Because of the ambiguity in previous findings, it was considered that a much larger item pool be constructed in the present study, in the attempt to project ethnic-white differences more accurately.

#### (IV). RETAIL PATRONAGE VARIABLES

Information was collected on the retail purchasing characteristics of Asian, West Indian and White shoppers, in order to determine how such behaviour causes differences to occur in their shopper patronage decisions in the retail grocery product field. The data base was provided by independent variables concerning:-

1. Store Type Patronised
2. Market Control
3. Store Loyalty
4. Frequency of Grocery Shopping
5. Mode of Transport and Transit Time for Grocery Shopping
6. Shopper Store Image Profiles for 'Real' and 'Ideal' Stores

The store image data was obtained, using the semantic differential as a scaling instrument. The instrument was

tailormade specifically to meet the needs of store image research. It consisted of 7 basic dimensions, each measured on at least three related attributes. This allowed consumer responses to be elicited on the following dimensions:-

DIMENSION I	Store Appearance
DIMENSION II	Product Assortment
DIMENSION III	Product Pricing
DIMENSION IV	Store Service and Dependability
DIMENSION V	Merchandise Selection
DIMENSION VI	Store Personnel
DIMENSION VII	Patronisation by Friends

These dimensions have been identified and carefully tested as being common to all the store types investigated Dickson and Albaum, 1977; Kelly and Stephenson, 1974), and, hence useful in constructing a general theory, on how consumers form images of retail stores irrespective of store type. Scale polarity was assigned randomly, and the interval scale was assumed as a statistical artifact in assigning values to the semantic scores. Responses were quantified by assigning a value of '1' to the least favorable position, up to a high of '7' for the most favorable position on the scale.



### SECTION 3:9 DATA ANALYSIS ~~~~~

The SPSS (Statistical Package for the Social Sciences), Nie, Bent and Hull, 1975, was utilised in the computer analysis and data processing of the market survey.

Chi-square tests based on relative frequencies, were performed in each instance, on the variables included in the questionnaire format. Associated percentage distributions are recorded in the respective chapters, in order to facilitate visual comparison of ethnic and white differences. Two sets of data were obtained in each case:-

1. Difference in responses between the Asian ethnic and white groups. These were treated as independent groups, with sample sizes of 210 and 86 respectively (both above the minimum value of  $n=30$ ).
2. Difference in responses between the West Indian ethnic and white groups, with sample sizes 22 and 86 respectively. The groups were again treated as independent of each other, for purposes of computing the chi-square values.

Additionally, 't' tests were conducted for variables entailing measurement on interval scales, as described below.

#### (1). ANALYSIS OF AD PROFILE DATA ~~~~~

The 't' scores for the differences between independent group

means were computed, to test for the statistical significance of:-

- 1). Differences between 'ethnic' and 'white' item ratings, for each ad treatment.
- 2). Differences on item ratings across the ad profiles, within each consumer group.

## (2). ANALYSIS OF RETAIL PATRONAGE DATA

The profile contrast procedure was used, to identify differences between ethnic and white patronage perceptions.

This entailed:-

1. Analysis of differences in the 'real' store profiles, for the ethnic and white groups. Assuming that 'real' store ratings represent the most preferred retail outlet, it was hypothesised that the differences in items found significant, would imply that the 'regular' store outlet was perceived differently, with an inherent consumer bias to perceive it critically. The profiles would therefore bring into sharp focus, the attitudinal differences existing between ethnic and white shoppers (Grubb and Grathwohl, 1967; Martineau, 1963; Markin, 1969; Mason and Meyer, 1970).

Empirical studies indicate, moreover, that 'real' and 'ideal' store ratings are closely related to the 'real' self-concepts, because shoppers tend to choose the retail store

that best fits the self-concept (Davidson, 1973; Martineau, 1963; Birdwell, Dolich and Ross, 1971). Consequently the 'real' store ratings were taken to accurately measure differences in ethnic and white motivations for retail outlet choice.

2. Analysis of the difference in mean ratings for the 'real' and 'ideal' stores for each group. This was expected to provide information on how well competing retail stores serve the perceived needs of ethnic and white shoppers, and to what extent they are communicating retail store images successfully. Differences between the 'real' and 'ideal' stores provided a perspective on consumer assessments of the 'real' as compared to the 'ideal' store, since respondents would have perceptions of stores that are not identical to their 'ideal' store, with regard to merchandising policies, assortments and geographical location.

Lastly, 't' tests were also performed, in order to examine differences in mean ratings with regard to the importance attributed to product attributes, as well as for differences in ethnic and white 'self', and 'car' concept data.



### SUMMARY AND CONCLUSIONS TO CHAPTER 3

To sum up the main points of the research methodology:-

1. A consumer survey was conducted, using systematic probability sampling, in order to ensure a scientific approach to the conduct of the survey.  
The method of multistage sampling using a variable sampling fraction was utilised in the sampling scheme, thus allowing for a greater probability of selection of wards with a larger incidence of ethnic consumers. An equal number of consumers were then systematically selected from each ward, thus restoring to all consumers an equal chance of inclusion in the sampling list. The personal interview technique was utilised, so as to facilitate the direct collection of primary data from consumers with different linguistic orientations.
2. The investigation was based on the Birmingham Metropolitan Area in the West Midlands region. This region contains the second-largest concentration of ethnic consumers, and was thus suitable for market segmentation and planning strategies. The sample was drawn from the six Birmingham ward areas of Handsworth, Sparkbrook, Smallheath, Saltley, Moseley and Ladywood.
3. The Asian ethnic sample was selected as the focus for investigation, because it represents a consumer

population that is among the largest of the UK ethnic markets. A West Indian ethnic sample was also investigated, on characteristics that distinguish it from the white consumer market. A control sample of white consumers was taken for purposes of ethnic and white cultural comparability.

The Asian ethnic group comprised a sample size of 250 consumers. This allowed each ward sub-sample to contain sufficient sampling units to represent standard normal distributions and, therefore, permit an analysis by ward area. A sample size of 120 was taken for the white consumer sample. The West Indian sample was subsequently drawn from the general consumer sample, and consisted of 22 consumers.

4. Independent sampling frames based on the 1971 Census and, drawn in each instance from the electoral registers, were used for selection of the ethnic and white groups within the same geographical ward areas. This procedure was considered more advantageous than a study of groups drawn from a single sampling frame. It was also posited to increase the precision and efficiency of the sample results by minimising sampling errors arising from any between-group variability in a larger heterogeneous sample.

5. The methodological paradigm utilised a market segmentation research framework, and was based on the

premise, that, given a heterogenous UK market which is amenable to segmentation, the 'ethnic factor' would serve as an 'a priori' basis for initially differentiating between ethnic groups, which could be expected to show differing elasticities to culturally related marketing and consumption variables.

The marketing variables used in the questionnaire design, encompassed the four major aspects of product and brand choice, pricing, retailing and advertising, in order to study ethnic marketing strategy within an integrated framework.

To conclude a consideration of the points enumerated above, it must be emphasised that the survey was conducted in areas of high ethnic concentration, since the purpose was to give a broad, generalised view of the characteristics of ethnic groups as they are amenable to consumer marketing. An important point to consider however, is that consumers living in comparative isolation are likely to differ from those living in areas of higher concentration. Since these account for only a small proportion of the total, they could not justify the expenditure of a substantial portion of the survey budget. Such a bias, though acceptable in a general descriptive survey of ethnic consumers, would require further refinement in future studies.

Chapter 4 next goes on to describe the ethnic demographic  
~~~~~  
structures, as they make for primary differences from the

CHAPTER 4

ETHNIC MARKET INTELLIGENCE

INTRODUCTION

The need for target market intelligence on ethnic groups within a consumer context, comes sharply into focus when considered in the light of the continued dearth of exhaustive census or market data, which would allow ethnic marketing policies to be considered within a factual context. In particular, there has been a tendency, in existing statistics, to bypass linguistic and religious variations, as well as the associated cultural nuances that are crucial in targeting ethnic markets.

In this chapter, an attempt is made to give a comprehensive description of the basic ethnic marketing parameters, that are essential in the development of marketing strategies. The chapter further analyses future changes in the size and structure of the ethnic groups, to assess whether they would constitute 'substantial' market segments, amenable to segmentation strategies, as discussed in Chapter 1. Projections based on official government statistics were used, to provide indications of current and future ethnic consumer demand. Assessments of these 'future' target markets have important practical and managerial implications,

since limited knowledge might, as Simpkin, 1976 has pointed out in the case of dealing with all 'foreign' markets, cause the marketer to:-

"... subconsciously put the interpretation that suits him best... on the confused and confusing picture produced in his mind." (p.106).

SECTION 4:1 ETHNIC MARKET SIZE

The size of the total UK consumer population is estimated to have remained relatively stable, through the decade from 1970 to 1980, at just under 56 million (Market Research Great Britain, 1978; (Social Trends, 13, 1983)). The ethnic market, comprising a population of diverse 'ethnic' and 'coloured' groups, each with markedly different cultural characteristics, consists essentially of the West Indian ethnic group, the Asian ethnic groups originating from the Indian subcontinent, and a conglomerate subgroup originating from the other New Commonwealth countries in Asia, Africa and the Mediterranean.

In contrast to the white market, the ethnic population has been increasing steadily at an average rate of 5% a year, and was estimated as 3.77 percent of the UK population in mid-1981, with a market size of 2.104 million consumers within a UK population of 55.676 million, (Table 4:1).

TABLE 4:1

ETHNIC MARKET SIZE

| <u>CENSUS ENUMERATED
MID-YEAR ESTIMATES</u> | <u>UK
MARKET SIZE</u>
million | <u>ETHNIC
MARKET SIZE</u>
million | <u>ETHNIC MARKET
AS % OF
UK MARKET</u> |
|---|--------------------------------------|--|--|
| 1976-77 | 55.886 | 1.771 | 3.4 |
| 1977-78 | 55.852 | 1.846 | 3.5 |
| 1978-79 | 55.836 | 1.920 | 3.6 |
| 1979-80 | 55.900 | 2.013 | 3.7 |
| 1980-81 | 55.676 | 2.104 | 3.77 |
| <u>PROJECTIONS</u> | | | |
| 1986-87 | 56.4 | 2.22-2.47 | |
| 1991-92 | 57.2 | 2.47-2.95 | 4.5-5.3 |
| 2001-02 | 58.4 | 3.0 -4.0 | 5.0-7.0 |

* PROJECTIONS BASED ON MID-1976 ESTIMATES

* PROJECTIONS EXCLUDE POPULATION OF MIXED DESCENT

SOURCE: OFFICE OF POPULATION CENSUSES & SURVEYS

SECTION 4:2 ETHNIC MARKET GROWTH POTENTIAL

As Section 4:1 above pointed out, the ethnic segment has been increasing much faster than the general population. A neglect of this fact by the marketer is excusable to some extent, in view of the negative media stereotypes (Hartman and Husband, 1974; Troyna, 1981), that have deterred the advertising industry from giving visibility to ethnic cultures, and also, because of the relative recency of the existence of this market sector, dating only from the post World War II period (Smith, 1978).

These marketing implications become even clearer, on

consideration of the ethnic growth trends over the next two decades, to the year 2001. Two detailed projections on the overall size of the ethnic population, have been prepared by the Registrar General (Social Forces, 1979; Population Trends, 1979), using the mid-1976 ethnic population estimates as the base. Making allowances for the net natural increases in the population groups of ethnic descent, and also for further net migration, the directions of future changes in the ethnic population, excluding the population of mixed ethnic descent, were estimated as below:-

1. The Higher Variant Assumption

The higher variant assumption projects ethnic population sizes, on a consideration of high migration levels and high birth rates. Allowing that net inward ethnic migration (from the West Indies, the Indian subcontinent, and other countries of the New Commonwealth), might continue at a level of 40 thousand per year, at roughly the average level of migration over the past five years, covering mid-1971 to mid-1976, this projection was put forward as an illustration of what might occur under existing UK colonial commitments, and the rate at which applications to enter are made by the dependants of people of ethnic descent. The growth in the ethnic population due to natural increase was considered proportionate to the relative shares for the three subgroups, and of the order, West Indian:Asian:Other (Mainly Chinese), equivalent to 3:5:2. Taking a weighted average of 3.5, for

the assumed birth rates of these three sub-groups, the higher variant assumption considered a slow decline in the convergence of ethnic birth rates towards UK levels, from a current figure of 3.5 to that of 2.7 by 1991, which would still be substantially above the national average replacement level of 2.1.

On the basis of the above factors, the 15 years ahead foresee an increase in the ethnic sector at a rate of 3.5 percent annually, over the years 1986-1991, making it an overall 5.3 percent of the UK market.

2. The Lower Variant Assumption

The lower variant projection assumed that net inward migration will decline more rapidly, to a figure of 15 thousand a year by 1982, remaining at that level over the 15 years of the projection period from mid-1976 to mid-1991. This implies a substantial fall compared with recent migrations during the early 1970's, resulting in a very different pattern of future net migrations for these groups. Secondly, it was assumed that ethnic birth rates would follow a process of rapid, rather than the slow convergence considered for the higher population assumption, resulting in a decline in ethnic replacement levels, from the mid-1976 estimate of 3.5 to 2.1, making it eventually similar to the UK national average. The growth rate of the UK ethnic population would therefore indicate a sharp deceleration,

from an average annual increase of 5% during 1971-1976, to an increase of 2.2% annually, by 1986-1991. On this assumption the ethnic market would, by 1991, constitute 4.5 percent of the UK market (Table 4:2).

A continuation of these projections to the end of the century, gives indications that, the ethnic market size on the lower variant assumption, allowing for a sharp decrease in growth due to the combined effect of a decline in immigration as well as replacement levels, would approach 3 million people in 2001, making it a minimum 5 percent of the UK British market. On the higher variant assumption, allowing for a gradual deceleration, due to slower declines in net in-migration, as well as replacement rates, the ethnic population would approach 4 million by 2001, making it 7 percent of the projected UK population. In addition to these market growth statistics, for UK subgroups of solely ethnic descent, the population of mixed ethnic descent is projected to increase on the basis of the trends observed, from 138 thousand in 1976, to 300 thousand by 1991. This would give it an order of about 500 thousand, or half a million by the end of the century, along with complicated ancestry definitions in ethnic terms. Adding these figures to the above, the overall ethnic market would be of a broad magnitude of 2.50 - 2.75 million by mid-1986, and between 2.75 - 3.25 million, by mid-1991.

TABLE 4:2
 PROJECTIONS OF ETHNIC MARKET SIZE TO 1991

| | MARKET ESTIMATE | PROJECTED MARKET SIZE
(thousands) | | |
|-----------------------------------|-----------------|--------------------------------------|---------|---------|
| | 1971-76 | 1976-81 | 1981-86 | 1986-91 |
| <u>LOWER VARIANT ASSUMPTION</u> | | | | |
| (LOW MIGRATION LEVELS) | | | | |
| (LOW REPLACEMENT LEVELS) | | | | |
| POPULATION AT START | 1,278 | 1,642 | 1,961 | 2,218 |
| NATURAL INCREASE | + 168 | + 183 | + 182 | + 178 |
| BIRTHS | + 192 | + 216 | + 223 | + 231 |
| DEATHS | - 24 | - 33 | - 41 | - 53 |
| NET ETHNIC MIGRATION | + 195 | + 135 | + 75 | + 75 |
| CHANGE IN ETHNIC
CONSUMER SIZE | + 363 | + 319 | + 257 | + 253 |
| POPULATION AT END | 1,642 | 1,961 | 2,218 | 2,471 |
| ANNUAL ETHNIC INCREASE | 5.1% | 3.6% | 2.5% | 2.2% |
| <u>HIGHER VARIANT ASSUMPTION</u> | | | | |
| (HIGH MIGRATION LEVELS) | | | | |
| (HIGH REPLACEMENT LEVELS) | | | | |
| POPULATION AT START | 1,278 | 1,642 | 2,028 | 2,469 |
| NATURAL INCREASE | + 234 | + 200 | + 240 | + 269 |
| BIRTHS | + 192 | + 234 | + 283 | + 326 |
| DEATHS | - 24 | - 34 | - 43 | + 56 |
| NET ETHNIC MIGRATION | + 195 | + 185 | + 200 | + 200 |
| CHANGE IN PERIOD | + 363 | + 386 | + 441 | + 469 |
| POPULATION AT END | 1,642 | 2,028 | 2,469 | 2,938 |
| ANNUAL ETHNIC INCREASE | 5.1% | 4.3% | 4.0% | 3.5% |

* EXCLUDING ETHNIC POPULATION OF MIXED DESCENT

SOURCE: POPULATION TRENDS, NO. 16, 1979

In terms of the changing composition of the UK consumer structure, the essential fact that must be considered is, that though the UK continues to remain a net exporter of people (International Passenger Survey, IPS, 1979), albeit to a declining extent, and that too, to the Old Commonwealth countries, the EEC, and more lately to the Middle East, the out-migrations have been balanced by a level trend in in-migration from the New Commonwealth, leading to an overall change amounting to +0.1 percent, in the population growth rate (International Migration, 1975).

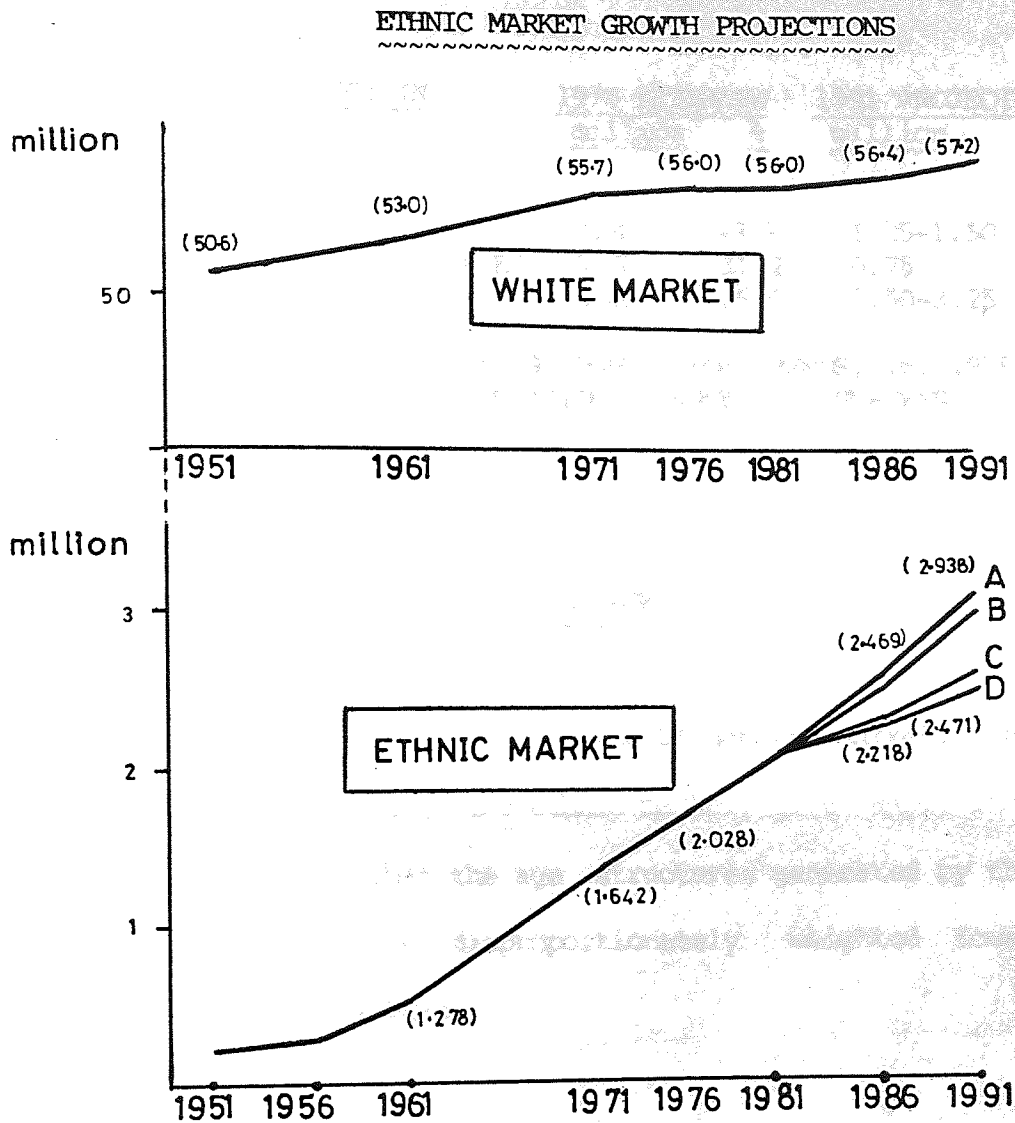
This would have an appreciable effect, over the years, in contributing to a fairly stable ethnic market segment. The above projections are illustrated diagrammatically in Figure 4:1 overleaf.

SECTION 4:3 ETHNIC MARKET DEMOGRAPHY

ETHNIC DEMOGRAPHIC BREAKDOWN BY ORIGIN

A consumer market breakdown by ethnic 'origin', in Table 4:3, which follows immediately after, indicated that the largest subgroup comprises the Asian ethnic market, with origins from the Indian subcontinent.

FIGURE 4:1



* 1976 BASED PROJECTIONS

VARIANT A: HIGHER MIGRATION, HIGHER FERTILITY

VARIANT B: HIGHER MIGRATION, LOWER FERTILITY

VARIANT C: LOWER MIGRATION, HIGHER FERTILITY

VARIANT D: LOWER MIGRATION, LOWER FERTILITY

SOURCE: Adapted from Population Trends, 16, Summer 1979, p.27

TABLE 4:3

ETHNIC MARKET SIZE BY CULTURAL ORIGIN

| <u>ETHNIC ORIGIN</u> | <u>1976 ESTIMATE</u> | | <u>1991 PROJECTION</u> | |
|----------------------|----------------------|----------|------------------------|----------|
| | <u>million</u> | <u>%</u> | <u>million</u> | <u>%</u> |
| ETHNIC ASIAN | 0.80 | 43.2 | 1.25-1.50 | 37.0 |
| ETHNIC WEST INDIES | 0.50 | 31.2 | 0.75 | 24.5 |
| OTHER ETHNIC | 0.40 | 25.0 | 2.50-3.25 | 34.7 |

SOURCE: SOCIAL FORCES, 9; POPULATION TRENDS, 16, 1979
OFFICE OF POPULATION CENSUSES AND SURVEYS

ETHNIC MARKET DEMOGRAPHY BY AGE

Comparative breakdowns of the UK general market, and of the groups comprising the ethnic market, give ample indications (Table 4:4), that the age structures generated by the ethnic populations are disproportionately weighted towards the younger submarkets.

TABLE 4:4

ETHNIC DEMOGRAPHIC DISTRIBUTION BY AGE

| <u>AGE STRUCTURE</u> | <u>WHITE CONSUMERS</u> | <u>ETHNIC CONSUMERS</u> |
|----------------------|------------------------|-------------------------|
| | <u>%</u> | <u>%</u> |
| 0-14 yrs | 22.0 | 37 |
| 15-29 yrs | 21.9 | 28 |
| 30-44 yrs | 18.6 | 22 |
| 45-64 yrs | 22.8 | 11 |
| 65+ yrs | 14.6 | 2 |
| [TOTAL] | [100] | [100] |

SOURCE: POPULATION TRENDS, NO. 16, 1979, OPCS
* MID-1976 BASED ESTIMATES

According to these 1976 estimates, the ethnic market has a greater proportion of consumers currently concentrated in the younger age-structures, compared to figures for the total Great Britain population.

Demographic projections shown in Table 4:5 below, indicate further, that consumer numbers within the different age groups for the overall UK market, are expected to fluctuate only slightly, with incremental increases in the higher age groups. In contrast, the age structures projected in Table 4:6 for the ethnic market, serve to point to a changing future distribution.

TABLE 4:5

PROJECTIONS OF WHITE CONSUMER MARKET BY AGE

| <u>AGE GROUPS</u> | <u>ESTIMATE</u> | <u>PROJECTIONS</u> | | | |
|-------------------|-----------------|--------------------|------|------|--|
| | million | million | | | |
| | 1976 | 1980 | 1986 | 1991 | |
| 0-16 yrs | 13.7 | 12.8 | 12.0 | 12.5 | |
| 16-29 yrs | 11.4 | 11.7 | 12.5 | 12.2 | |
| 30-44 yrs | 9.9 | 10.8 | 11.3 | 11.9 | |
| 45-64 yrs | 12.9 | 12.5 | 12.1 | 12.1 | |
| 65+ yrs | 7.9 | 7.9 | 8.4 | 8.6 | |

SOURCE: POPULATION TRENDS, NO. 16, 1979,
OFFICE OF POPULATION CENSUSES AND SURVEYS

TABLE 4:6
~~~~~  
PROJECTIONS OF ETHNIC CONSUMER MARKET BY AGE  
~~~~~

| <u>AGE GROUP</u> | <u>MARKET SIZE</u> | | <u>ETHNIC MARKET</u> | |
|-----------------------|--------------------|-------------|----------------------|-------------|
| | <u>ESTIMATES</u> | | <u>PROJECTIONS</u> | |
| | <u>1976</u> | <u>1981</u> | <u>1986</u> | <u>1991</u> |
| | <u>%</u> | <u>%</u> | <u>%</u> | <u>%</u> |
| <u>LOWER VARIANT</u> | | | | |
| 0-14 yrs | 37 | 32 | 29 | 27 |
| 15-29 yrs | 28 | 32 | 33 | 30 |
| 30-44 yrs | 22 | 20 | 20 | 23 |
| 45-64 yrs | 11 | 14 | 16 | 17 |
| 65+ yrs | 2 | 2 | 2 | 3 |
| <u>HIGHER VARIANT</u> | | | | |
| 0-14 yrs | 37 | 32 | 30 | 29 |
| 15-29 yrs | 28 | 32 | 33 | 29 |
| 30-44 yrs | 22 | 20 | 20 | 24 |
| 45-64 yrs | 11 | 14 | 15 | 15 |
| 65+ yrs | 2 | 2 | 2 | 3 |

* 1976 BASED PROJECTIONS

SOURCE: POPULATION TRENDS, No.16, 1979,
OFFICE OF POPULATION CENSUSES AND SURVEYS

Detailed comparisons of the age distributions shown in Tables 4:5 and 4:6 with regard to the white and ethnic market segments, indicate that a mere 13 percent of ethnic consumers in 1976 were in the 45-65+yrs age group, compared to 37 percent of the UK market, making this a small submarket, for the ethnic groups. By 1991 the proportion of ethnic consumers within this age market is expected to increase to a level between 18 percent and 20 percent, in comparison to 36 percent for the Great Britain consumer market in this range.

In contrast, the younger, 0-14 yrs age market was estimated as constituting 37 percent of the ethnic segment in 1976, and is projected to decrease to 27 percent - 29 percent by 1991, still comprising a higher proportion of the ethnic market, in comparison to parallel figures for the general market. As Table 4:7 following below, shows, however, the heavy concentration in the lower age groups, will have levelled off by 1991, so that the ethnic market would have moved quite a way towards longer term stabilisation, at a proportion of approximately 6 percent of the national consumer market, within each category.

TABLE 4:7

ETHNIC CONSUMERS AS PERCENTAGE OF GREAT BRITAIN CONSUMERS

| AGE GROUPS | 1976 ESTIMATE | 1991 PROJECTIONS | |
|--------------------------------------|-----------------|------------------|------------------|
| | [BASE] ETHNIC % | LOWER VARIANT % | HIGHER VARIANT % |
| 0-14 yrs | 4.8 | 6.0 | 7.8 |
| 15-29 yrs | 3.9 | 6.0 | 6.9 |
| 30-44 yrs | 3.7 | 4.9 | 6.1 |
| 45-64 yrs | 1.5 | 3.5 | 3.8 |
| 65+ yrs | 100.4 | 0.9 | 0.9 |
| ETHNIC MARKET AS % OF BRITISH MARKET | 143.0% | 4.5% | 5.3% |

SOURCE: POPULATION TRENDS, No.16, 1979,
OFFICE OF POPULATION CENSUSES AND SURVEYS

ETHNIC CONSUMER STRUCTURE BY OCCUPATION ~~~~~

An analysis of ethnic occupational distributions, reflects aspects of these submarkets, that have generally been ignored, for their applicability to marketing policy issues. An important point highlighted via a comparison of Asian ethnic and white groups in Table 4:8 was, that the socioeconomic distributions, particularly the professional and managerial categories, are not significantly different for the Indian-Asian subgroup and the white consumer population, though the proportions of blue collar workers were greater in the Pakistani-Asian subgroup.

TABLE 4:8
~~~~~  
OCCUPATIONAL STRUCTURE OF ASIAN ETHNIC MARKET  
~~~~~

| <u>SOCIOECONOMIC
CATEGORY</u> | <u>ETHNIC ORIGIN</u> | | | | | |
|-----------------------------------|----------------------|---------------|------------------|---------------|---------------|------------------|
| | <u>MALE</u> | | | <u>FEMALE</u> | | |
| | <u>WHITE</u> | <u>INDIAN</u> | <u>PAKISTANI</u> | <u>WHITE</u> | <u>INDIAN</u> | <u>PAKISTANI</u> |
| | % | % | % | % | % | % |
| PROFESSIONAL | 6 | 10.3 | 4.2 | 1 | 2.7 | 6.7 |
| EMPLOYERS/MANAGERS | 16 | 9.5 | 4.8 | 6 | 2.1 | 3.7 |
| INTERMEDIATE/
JUNIOR NONMANUAL | 17 | 14.9 | 6.6 | 33 | 35.8 | 44.8 |
| SKILLED | 40 | 35.0 | 30.7 | 10 | 12.0 | 7.2 |
| SEMISKILLED | 16 | 20.1 | 37.3 | 30 | 39.6 | 34.1 |
| UNSKILLED MANUAL | 5 | 10.2 | 16.4 | 14 | 7.8 | 3.5 |
| BASE | [100] | [100] | [100] | [100] | [100] | [100] |

SOURCE: NDHS LABOUR FORCE INFORMATION, 1981, TABLES 17,19

A similar analysis of occupational distributions for the West Indian ethnic and white populations, displayed in Table 4:9, indicated that there was a higher proportion of the West Indian ethnic group in the blue collar, skilled manual category, though the difference from white consumers was not significant. West Indian men were also less likely to be of professional status. Such differences have, as, in the case of the Asian ethnic groups, been explained on the basis of differing age structures and skill levels (Smith, 1978; Labour Force Information from the NDHS, 1981).

TABLE 4:9

OCCUPATIONAL STRUCTURE OF WEST INDIAN ETHNIC MARKET

| <u>SOCIOECONOMIC
CATEGORY</u> | <u>ETHNIC ORIGIN</u> | | | |
|-----------------------------------|----------------------|------------------------|---------------|------------------------|
| | <u>MALE</u> | | <u>FEMALE</u> | |
| | <u>WHITE</u> | <u>WEST
INDIAN</u> | <u>WHITE</u> | <u>WEST
INDIAN</u> |
| | % | % | % | % |
| PROFESSIONAL | 6 | 1 | 1 | - |
| EMPLOYERS/MANAGERS | 16 | 4 | 6 | - |
| INTERMEDIATE/
JUNIOR NONMANUAL | 17 | 8 | 50 | 48 |
| SKILLED MANUAL | 40 | 50 | 8 | 7 |
| SEMISKILLED MANUAL | 16 | 26 | 28 | 36 |
| UNSKILLED MANUAL | 5 | 13 | 7 | 9 |

SOURCE: LABOUR FORCE INFORMATION FROM THE NDHS, 1981
TABLE 17

These differences became more obvious, by a comparison of the

occupational distributions for economically active women in the two groups. The existing data thus indicate that there are no significant differences in the skill-mix between women in the Asian ethnic and the white consumer groups. A similar comparison for West Indian ethnic women, gave indications, that, though the latter are much more likely than white women, to be in 'intermediate' and 'junior non-manual' occupations, they do not, on the whole have a different skill mix.

Yet another aspect of the ethnic socio-economic structure that has bearings for marketing policy, is evident from a comparison of age distributions of economically active consumers in the ethnic and white population groups (Tables 4:10 and 4:11). Thus, the 16-29 years age category for instance, had ethnic concentrations of the order, West Indian:Pakistani:Indian:White equivalent to 81:38:43:29.

TABLE 4:10

PROPORTIONS OF ECONOMICALLY ACTIVE CONSUMERS
IN ETHNIC AND WHITE GROUPS (MALE)

| AGE GROUP | ETHNIC ORIGIN | | | |
|-----------|---------------|--------|-----------|-------------|
| | WHITE | INDIAN | PAKISTANI | WEST INDIAN |
| | % | % | % | % |
| 16-29 | 29.8 | 43.2 | 38.2 | 80.9 |
| 30-44 | 31.5 | 35.7 | 41.1 | 10.9 |
| 45-64 | 36.2 | 20.7 | 20.7 | 8.2 |
| 65+ | 2.5 | 0.4 | - | - |
| [BASE] | [100] | [100] | [100] | [100] |

SOURCE: LABOUR FORCE INFORMATION FROM NDHS, 1981, TABLE 9

TABLE 4:11
~~~~~  
PROPORTIONS OF ECONOMICALLY ACTIVE CONSUMERS  
~~~~~  
IN ETHNIC AND WHITE GROUPS (FEMALE)
~~~~~

AGE GROUP ~~~~~	WHITE ~~~~~	INDIAN ~~~~~	PAKISTANI ~~~~~	WEST INDIAN ~~~~~
	%	%	%	%
16-29 yrs	32	49.9	60.6	81.0
30-44 yrs	31	38.8	27.8	15.5
45-64 yrs	31	11.1	11.6	3.6
65+ yrs	6	0.2	-	-

SOURCE: LABOUR FORCE INFORMATION FROM NDHS, 1981, TABLE 9

In particular, revealing insights into ethnic buying power, are provided by the economic activity levels of consumers by age group, as shown in Tables 4:12 and 4:13:-

TABLE 4:12  
~~~~~  
CONSUMER ECONOMIC ACTIVITY LEVELS (MALE)
~~~~~

AGE GROUP	WHITE	INDIAN	PAKISTANI/ BANGLADESH	WEST INDIAN
	%	%	%	%
16-25	81.3	70.2	73.5	74.5
25-34	98.3	97.9	96.3	99.1
35-44	98.4	98.9	98.3	99.9
45-54	97.2	91.4	95.1	98.5
55-64	87.1	90.0	-	91.2

SOURCE: LABOUR FORCE INFORMATION FROM NDHS, 1981, TABLE 11

TABLE 4:13  
~~~~~  
CONSUMER ECONOMIC ACTIVITY LEVELS (FEMALE)
~~~~~

<u>AGE GROUP</u>	<u>ETHNIC ORIGIN</u>			
	<u>WHITE</u>	<u>INDIAN</u>	<u>PAKISTANI/ BANGLADESH</u>	<u>WEST INDIAN</u>
	%	%	%	%
16-25	59.0	60.0	12.0	62.4
25-34	49.5	48.1	8.2	78.2
35-44	66.1	59.8	11.4	88.1
45-54	61.0	34.9	8.0	87.1

SOURCE: LABOUR FORCE INFORMATION FROM NDHS, 1981, TABLE 11  
DEPARTMENT OF EMPLOYMENT

Tables 4:12 and 4:13 thus give evidence that, for the lower age groups, women of Asian-Indian ethnic origin have higher economic activity rates in comparison to those of white, Anglo-Saxon ethnic origin. However, comparatively lower economic activity rates exist for the older age groups. In contrast, women of Asian-Pakistani ethnic origin, all had significantly lower economic activity rates. In fact, only one in ten women of Pakistani/Bangladeshi ethnic origin are indicated as being economically active.

As noted at the start of Section 4:3, since women of Indian ethnic origin are heavily clustered in the lower age groups, it would appear that they constitute a higher proportion of economically active consumers in these age markets, and accordingly have greater buying power than women of white

ethnic origin. Women of Pakistani ethnic origin, being less likely to be economically active, would, however, as a group be expected to have lower levels of the buying power that goes with economic activity.

In marked contrast, West Indian ethnic women were much more likely than white women, to have higher economic activity rates at all ages. For the marketer, this implies that West Indian ethnic women across all age groups and socio-economic categories, have greater buying power than white women.

#### ETHNIC REGIONAL DEMOGRAPHY

At the level of a spatial analysis, the regional distributions for the ethnic submarkets (Table 4:14), indicated area concentrations of the groups, with 75 percent of the latter concentrated in the South East and West Midlands regions of England.

Within this heavy concentration, a high of 60 percent of the ethnic market segment was in the South East region, the highest spatial density being in London, and another 15 percent of the ethnic market was evidently localised in the West Midlands region. The remaining population for the ethnic market is equally distributed, spatially, at 5 percent to 8 percent, each, in the three areas of the West Midlands, the North East, and Yorks/Humberside.

TABLE 4:14

## ETHNIC MARKET SIZE BY REGION

REGION	ETHNIC ORIGIN					TOTAL ETHNIC
	WHITE	WEST INDIAN	INDIAN	PAKISTANI/ BANGLADESHI	OTHER CHINESE	
	%	%	%	%	%	%
NORTH	7	-	1	-	2	1
NORTH-WEST	15	7	5	19	8	8
YORK/HUMB	11	5	6	20	5	7
EAST MIDLANDS	9	5	5	2	5	5
WEST MIDLANDS	11	17	22	14	9	15
SOUTH-EAST	37	64	57	28	64	60
(GREATER LONDON)	15	56	49	28	50	5
SOUTH-WEST	9	3	1	13	4	2
ENGLAND	43,670	518	780		812	2,110
[BASE]	[100]	[100]	[100]	[100]	[100]	[100]

SOURCE: LABOUR FORCE INFORMATION FROM NDHS, 1981, TABLES 7&8,  
DEPARTMENT OF EMPLOYMENT

From the above, the following points can be enumerated:-

1. Analysed in terms of ethnic submarkets, the figures indicate that 64 percent of the West Indian market in England is localised in the South East, in comparison to 57 percent for the Asian-Indian subgroup, 28 percent of the Asian-Pakistani/Bangladeshi, Muslim subgroup, and 64 percent of the heterogenous submarket, comprising a large segment of Oriental Chinese consumers. The South East is therefore equally exposed to the influences of diverse ethnic cultures, their impact being greatest within the Greater London market.



2. The West Midlands, as stated above, contains 15 percent of the ethnic population, compared to a proportion of 11 percent for the white population. While the 15 percent figure includes a higher concentration of the Asian-Indian in comparison to other nationality groups, this difference has not been found significant, in terms of the proportions of the ethnic sub-group consumer mix.
3. The North-West contains a slightly higher proportion, 19 percent, of the Asian-Pakistani/Bangladeshi, Muslim, nationality and religious subgroup, in comparison to 15 percent for the white consumer market. In proportionate terms, this ethnic submarket is also larger than the Asian-Indian or West Indian consumer segments.

A demographic breakdown by major city/town concentrations, in Table 4:15, gave estimates indicating that in terms of spatial density, the Leicester city area in the East Midlands region, has the highest ethnic concentration, with a market measuring 22.1 percent of the city consumer population.

The cities/towns of Birmingham, Wolverhampton, Greater London are also estimated as areas of high ethnic density, with market sizes at 13.4 percent, 15.4 percent and 13.8 percent of the city consumer populations respectively.

The relative proportions of the Asian and West Indian ethnic

markets in these cities, also vary. Thus, in terms of market size, the urban areas of Leicester, Wolverhampton, Coventry, Sandwell, Bradford and Birmingham all have ethnic consumer populations biased towards the Asian, rather than West Indian ethnic market.

In contrast, the city of Reading in the South East, has a West Indian market that is larger in terms of consumer numbers (4,600:2,900), than the Asian ethnic group.

TABLE 4:15

ETHNIC MARKET SIZE BY CITY

REGION	CITY	ETHNIC ORIGIN				ETHNIC MARKET AS % OF CITY CONSUMERS
		WHITE	ASIAN ETHNIC	WEST INDIAN ETHNIC	OTHER CHINESE	
		'000	'000	'000	'000	
NORTH WEST YORK/HUMB	MANCHESTER	400.3	13.7	11.1	16.2	9.4%
	BRADFORD	404.3	34.9	2.7	8.3	10.2%
	KIRKLEES	334.7	21.4	5.3	31.7	8.6%
EAST MIDLANDS	LEICESTER	212.0	44.8	5.8	9.5	22.1%
WEST MIDLANDS	BIRMINGHAM	878.6	64.5	48.2	22.6	13.4%
	COVENTRY	279.2	19.0	3.3	4.8	8.9%
	SANDWELL	283.4	18.1	9.5	3.9	10.1%
	WOLVERHAMPTON	209.3	21.7	12.4	3.8	15.4%
SOUTH EAST	READING	119.1	2.9	4.6	3.4	8.4%
	GREATER LONDON	6,097	281.0	308.0	390.0	13.8%
ENGLAND		43,670	780.0	518.0	812.0	4.6%

SOURCE: LABOUR FORCE INFORMATION FROM NDHS, TABLE 21, 1981

The city of Manchester in the North West, had Asian and West Indian submarket concentrations that are approximately equal, at 13,700 and 11,100 respectively, denoting the potential for marketing to either of these segments equally profitably.

On an overall basis, these estimates indicate that the size in terms of consumer numbers is significant for the Greater London area, and implies a marketing potential at a total of some 979,000 ethnic consumers, followed by a West Midlands market size of 342,000 consumers.



#### SECTION 4:4 EMPIRICAL EVIDENCE ON ETHNIC MARKET DEMOGRAPHY

The data forwarded in this section, attempt to highlight, specifically, the religious, linguistic and nationality orientations of ethnic consumer markets in a small scale survey.

Additionally, age and socioeconomic distributions were also analysed, in view of the fact that existing Census and survey data could not be presumed to hold, without bias, for a regional market analysis.

The empirical evidence on age distributions for the ethnic and white consumer groups, given in Table 4:16, corroborated existing census statistics in highlighting the higher proportions of ethnic consumers in the 16-34 yrs and 35-44 yrs age markets. This was more so for the Asian, than the West Indian ethnic segment, with a ratio of Asian:West Indian:White equivalent to 84:45:61. While the West Indian ethnic group was found to have a high proportion 45.5 percent, in the 45-54 yrs age group in comparison to both, the Asian (5 percent), and the White (20 percent) markets, this might have been due to the small sample size of this group.

It is still evident, nevertheless, that the white segment had a much higher proportion of consumers, 12.5 percent, in the 65 plus age market, in comparison to the ethnic segments.

TABLE 4:16

## ETHNIC MARKET SIZE BY AGE STRUCTURE

<u>AGE GROUP</u>	<u>ETHNIC ORIGIN</u>		
	<u>WHITE</u>	<u>ASIAN</u>	<u>WEST INDIAN</u>
16-34 yrs	26 [29.5]	75 [36]	5 [22.7]
35-44 yrs	28 [31.8]	101 [48]	5 [22.7]
45-54 yrs	18 [20.4]	11 [5]	10 [45.5]
55-64 yrs	6 [6.8]	21 [10]	5 [9.5]
65+ yrs	11 [12.5]	2 [1]	- -
SAMPLE	88	210	22
[BASE]	[100]	[100]	[100]

\* PERCENTAGES ARE GIVEN IN BRACKETS

The empirical data on the socioeconomic structure of the ethnic market groups given in Table 4:17, highlighted the disparities emerging from the relatively greater proportions of professional white collar consumers for the white, in comparison to ethnic groups.

Additionally, there were only slight differences in the socioeconomic distributions for the West Indian ethnic and White consumers, with regard to the 'skilled' and 'unskilled' blue collar categories. A notable fact was the high proportion, 15 percent, of the Asian ethnic group in the 'self employed' category, which had the obvious effect of

reducing its proportion in the blue collar occupations.

TABLE 4:17

ETHNIC MARKET SIZE BY OCCUPATIONAL STRUCTURE

	ETHNIC ORIGIN		
	WHITE	ASIAN	WEST INDIAN
SELF EMPLOYED	-	32	-
	-	[15]	-
EMPLOYEE STATUS			
PROFESSIONAL/NONMANUAL	4	3	2
	[5]	[2]	[1]
SKILLED MANUAL/ SEMISKILLED	45	140	14
	[51]	[67]	[63]
UNSKILLED MANUAL	28	31	6
	[32]	[14]	[27]
NOT WORKING	11	4	-
	[12]	[2]	-
SAMPLE	88	210	22
BASE	[100]	[100]	[100]

\* PERCENTAGES ARE GIVEN IN BRACKETS

The evidence on ethnic income distributions (Table 4:18), was also found to follow a pattern consistent with, and similar to, their occupational and skill distributions.

Thus, while a majority of White consumers, 61 percent, were in the the £5000-£7999 income category, only 35.5 percent Asian, and 18 percent West Indians claimed incomes in this range. However, a higher proportion of Asian (18.2 percent), in comparison to White (12.8 percent) consumers, was

evidenced in the higher, £8000+ category. The majority in the West Indian ethnic group, nevertheless, claimed incomes in the £4000-£4999 range.

TABLE 4:18

ETHNIC MARKET SIZE BY INCOME

INCOME	ETHNIC ORIGIN		
	WHITE	ASIAN	WEST INDIAN
£2000-£2999	-	1	-
	-	[1.1]	-
£3000-£3999	4	13	1
	[4.7]	[14.4]	[4.5]
£4000-£4999	18	17	13
	[20.9]	[18.9]	[59.1]
£5000-£7999	53	32	4
	[61.6]	[35.5]	[18.2]
£8000+	11	27	4
	[12.8]	[18.2]	[30.0]
SAMPLE	88	210	22
[BASE]	[100]	[100]	[100]

\* PERCENTAGES ARE GIVEN IN BRACKETS

In terms of the urban distribution of religious subgroups, the evidence, in Table 4:19, indicated that:-

1. The largest Asian ethnic consumer submarket in the Birmingham area is of Pakistani, Muslim orientation, and comprises 50.5 percent of this market segment. The Sikhs, an Indian nationality subgroup, and the Hindus, also an Indian Nationality subgroup, together comprise

49.5 percent of the Asian ethnic segment in Birmingham, with a Sikh/Hindu ratio of 2:1, making the Sikh religious subgroup twice as large as the Hindu subgroup. These findings conform with existing NDHS data (Barber, 1981), and with 1971 county census data by country of birth, which give indications of approximately equal numbers of the populations of Indian and Pakistani/Bangladeshi ethnic origin.

TABLE 4:19

ETHNIC MARKET SIZE BY RELIGIOUS SUBGROUP

GROUP	ETHNIC ORIGIN						TOTAL
	HANDSWORTH	SALTLEY	SMALLHEATH	LADYPOOL	MOSELEY	SPARKBROOK	
MUSLIM	22 [73.3]	38 [95]	6 [15]	14 [70]	9 [22.5]	17 [42.5]	106 [50.5]
SIKH	5 [16.7]	- -	32 [80]	3 [15]	16 [40]	13 [32.5]	69 [32.8]
HINDU	3 [10]	2 [5]	2 [5]	3 [15]	15 [37.5]	10 [25]	35 [16.7]
TOTAL SAMPLE [BASE]	30 [100]	40 [100]	40 [100]	20 [100]	40 [100]	40 [100]	210 [100]

\* PERCENTAGES ARE GIVEN IN BRACKETS

- The Asian ethnic consumer distribution appears, moreover, in the form of clusters of religious subgroups within the ward areas, thus making them easily amenable to marketing



strategies oriented to target submarkets, based on differing religious orientations. Thus, the wards of Saltley and Handsworth had high proportions of the Muslim ethnic group, at 95 percent and 73 percent respectively, that of Smallheath had a Sikh ethnic cluster of 80 percent, while the Hindu ethnic group had a localisation of 38 percent within the Moseley ward area.

The Asian ethnic segment was further analysed in terms of its 'intra-ethnic' linguistic variations. The evidence, indicated in Table 4:20, pointed to the fact that the Asian ethnic market is constitutive of distinct linguistic subgroups, important for their existence as separate subsegments.

The importance of the language factor in communicating with ethnic groups, was highlighted by the evidence that, the main language, Punjabi, cut across boundaries delimited by religious and nationality constraints.

It thus predominated as the language of communication within the ward areas of Saltley, Handsworth, Sparkbrook, which were mainly Muslim in their orientation, as well as in the Smallheath market area which gave evidence of a high Sikh ethnic concentration.

TABLE 4:20

## ETHNIC MARKET SIZE BY LINGUISTIC SUBGROUP

MARKET AREA							
LANGUAGE	HANDSWORTH	SALTLEY	SMALLHEATH	SPARKBROOK	MOSELEY	LADYPOOL	TOTAL
URDU/ HINDI	3 [10]	7 [17.5]	2 [5]	6 [15]	2 [5]	-	20 [9.5]
PUNJABI	24 [80]	31 [77.5]	35 [87.5]	30 [75]	23 [57.5]	18 [90]	161 [76]
GUJARATI	3 [10]	-	2 [5]	3 [7.5]	15 [37.5]	2 [10]	25 [12.5]
BENGALI	-	2 [5]	1 [2.5]	1 [2.5]	1	1	4 [2]
SAMPLE [BASE]	30 [100]	40 [100]	40 [100]	40 [100]	40 [100]	20 [100]	210 [100]

\* PERCENTAGES ARE GIVEN IN BRACKETS

A combination of these three characteristics imposes on Asian consumers, social and cultural orientations quite different from those valid for the white market. The high predominance of clusters of the different language and religion groups within ward areas, indicates, moreover, that the Asian submarkets exist as self-defined units of religious clusters in these market areas. Evidence for ethnic segregation patterns, for the Asian ethnic groups, has also been given by previous researchers (Rex, 1967, Woods, 1979). The picture has been presented by Woods, 1979 as follows:-

"The Irish and West Indians more closely match the pattern of the total population, which cannot be said for the Asians, Africans, Maltese and Cypriots. The Indians, Pakistanis, Bangladeshis

and Cinghalese were by 1971; the group most highly separated from the total population, suggesting that at least in Birmingham, the West Indians are becoming less segregated and more dispersed throughout the city than the Asians.... Also, that those immigrants from the Indian subcontinent were not dispersing and that in fact, their degree of separation from the total population was increasing."

It is clear from the above, that the Asian and West Indian ethnic groups comprise segments that can be focused as separate targets on an inter-ethnic group level, as well as on the basis of ethnic-white consumer differences. In fact, the pattern of geographic and spatial segmentation, would perhaps, be the most profitable aspect of directing marketing efforts to these target groups.



#### SUMMARY AND CONCLUSIONS TO CHAPTER 4

The following descriptive summary statistics highlight the differences between the ethnic and white consumer markets:-

1. The ethnic segment has, on an overall basis, an estimated market size of 2.104 million according to mid-1981 figures. This makes it 3.77 percent of the consumer population of Great Britain, or 4.6 percent of the consumers in England.
2. A breakdown of the ethnic market according to subgroups, gave the following market sizes:-

Asian Ethnic	780,000	36.96%
West Indian Ethnic	518,000	24.6%
African Ethnic	80,000	3.8%
Other Ethnic	732,000	34.7%
Total Ethnic Consumers In England	2,110,000	[100]

On an intra-Asian basis, there is a high degree of variation due to the existence of different religious, nationality and linguistic orientations, thus giving rise to a number of diverse Asian eth-segments.

3. The ethnic groups are projected to be growth markets for the next two decades, both in terms of increasing consumer numbers and incomes, thus leading to increased spending power. According to the statistically projected growth estimates, the ethnic market will by 1991,

comprise between 4.5 percent and 5.3 percent of the market in Great Britain. A continuation of these trends to the end of the century will make it an estimated 5 percent to 7 percent of the consumer population.

4. The ethnic segments had age structures disproportionately weighted in favour of the younger age markets in the case of both, the Asian and West Indian groups. The marketing potential at present, is largest for the 0-14 yrs and 15-29 yrs age groups. This effect is expected to level out by 1991 to 2001, by which time the ethnic groups would have stabilised to an approximate 6 percent within each age subgroup of the UK consumer population.
5. Occupational and age structures indicated that the proportion of men in the West Indian consumer segment is largest in the 16-29 yrs age-group and, also in the 'skilled manual' category. Within the Asian ethnic group, the socio-economic distribution for men in the Indian-Asian subgroup was similar to that for the white segment, with a higher proportion in the professional/managerial categories in comparison to the proportion in the white consumer market. The socio-economic distribution for men in the Pakistani-Asian subgroup however, was similar to that for West Indian consumers, with a higher proportion in the 16-29 yrs age group, and also in the 'skilled manual', blue collar category.

Similar comparisons for female consumers indicated that for the lower age-groups, women in the Indian nationality subgroup had higher, and women in the Pakistani/Bangladeshi Muslim, nationality group had consistently lower economic activity rates, in comparison to women in the white consumer group. West Indian ethnic female workers were concentrated in the 16-29 yrs age group, largely in the 'intermediate' and 'skilled manual' categories. Significantly, they had higher economic activity rates in all age-groups compared to women in the white consumer segment. This indicates proportionately greater buying power among women in the West Indian ethnic group, as compared to those in the white or Asian segments.

6. The ethnic regional market was largest in the South East, at 1,214,000 or 58 percent of the total ethnic market. Of this, Greater London has the highest concentration, at 979,000 consumers or 46 percent of the ethnic market. The West Midlands region had the second largest figure at 342,000, or 16 percent of the ethnic consumer population in Britain. The remaining ethnic market, is distributed almost equally in the North West (8%), Yorks/Humberside (8%), East Midlands (5%), with small proportions in the regions comprising the North (1%), East Anglia (3%), and the South West (2%).

7. Additionally, the ethnic market is spatially distributed entirely in the urban city areas, with the largest concentrations in the inner city pockets that are designed for redevelopment through 'Partnership' projects in the coming decades. The highest spatial density of ethnic consumers is in Leicester, at 22.1% of the city's consumer population. Other metropolitan areas of high ethnic market density are Birmingham, (13.4%), Greater London, (13.8%), Wolverhampton, (15.4%).
8. The proportions of the regional and city consumer populations accounted for by the Asian and West Indian ethnic groups, also varied. Thus, the West Midlands has a larger Asian, than West Indian ethnic market. Leicester in the East Midlands, also has a higher proportion of the Asian ethnic, Indian nationality subgroup, compared to the West Indian ethnic group. Manchester, in the North West, and Greater London in the South East were approximately equal in their proportions of the Asian and West Indian ethnic subgroups. These concentrations are significant for their impact on the potential of Asian/Caribbean ethnic marketing in these areas.

It can be concluded from these descriptive statistics, that the ethnic consumer segments require a much more specific and penetrating analysis, in order to arrive at effective

marketing decisions in targeting these markets. They exist at present, essentially as 'foreign language' groups within the domestic UK market, and the religious, nationality and linguistic orientations that define and delimit them, serve as a succession of differentiating ethnic variables that reinforce the tendency to segmentation.

These various aspects are next reviewed briefly, before going on to explore the dynamics of ethnic market segmentation within existing product categories, in the proceeding chapters.



## CONCLUSIONS TO PART II

From the market data generated in Chapter 4 with regard to ethnic demographic characteristics, it can be concluded that the Asian and West Indian ethnic groups constitute separate and distinct segments that are readily identifiable in terms of their linguistic, religious, nationality and cultural characteristics, from the UK consumer market. They thus satisfy the basic criterion of 'measurability' as advanced in theories of market segmentation.

It was also concluded that the ethnic groups constitute an urban consumer segment, with the majority in the lower income and social class categories, and also comprising a lower age structure due to their post World War II migrations. Their localisation being in the inner city areas, the ethnic markets exist as 'cultural' islands within the UK market areas. Such geographically clustered concentrations allow for their easy 'accessibility', and also facilitate the selective focusing of market efforts on these segments.

Part III continues the investigation with an application of concepts of ethnic segmentation to the two product categories, information on ethnic media usage, the differential effectiveness of ethnic advertising appeals and retail patronage behaviour.

The Asian and West Indian ethnic groups are profiled on their

exposure to the mass media, in order to ascertain what proportion of their media usage is accounted for, primarily by stations oriented essentially to ethnic and black programming.

Subsequent to this, the effectiveness of alternative ad appeals will be delineated by examining the impact of the interrelated variables of ethnic origin, religion, and gender on attitudinal ad responses. Lastly, ethnic groups will be tested for differences in retail patronage and store image data, in order to assess the economic profitability of ethnic retailing within the UK market structure.

THE FOLLOWING TABLES  
WILL BE USED TO  
PRESENT THE DATA  
OBTAINED FROM THE  
RESEARCH  
ON THE  
RETAIL PATRONAGE  
AND STORE IMAGE  
DATA

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CHAPTER 5

ETHNIC SEGMENTATION IN THE LAUNDRY DETERGENT MARKET

INTRODUCTION

This chapter investigates the ethnic and white consumer markets with regard to the laundry detergent product category, in order to examine differences in the factors affecting consumer decision-making in these culturally distinct market segments.

Since laundry detergents represent a largely branded consumption category, marked by different levels of advertising expenditure (Henry, 1980), they allow for the formation of differential brand preferences despite essential similarities in product attributes. The short purchase intervals make for habitual purchasing behaviour, which is consequently characterised by high repeat purchase probabilities. An important aspect of current research on the usage of detergents, is the stress given to the issue of environmental pollution, and the marketing of brands to black and white groups based on their ecological consumer consciousness (Kinnear and Taylor, 1973; Kinnear, 1974; Taylor and Ahmen, 1974; 1977; Murphy, Kangun and Locander, 1978).

The detergent business has thus been described in a review by

Mintel, 1977, as being '...in many ways, the archetype of aggressive, fast moving consumer markets.' While marked by free enterprise, a lot of the improvement in this sector, owes itself to the heavy investment of the detergent companies in technical and marketing innovations. Because of this and related factors, the preferential differences in brand loyalty between ethnic and white consumer groups, constitute an issue which will eventually pose of immense value to marketing.

Accordingly, the major aspects of the product-market considered here, are:-

1. A description of consumption trends within the UK detergent market.
2. An empirical examination of ethnic and white consumer segments on the factors affecting product choice, namely, product purchase, purchasing levels within the different age and socioeconomic categories, pack-size purchase and purchase frequencies, brand loyalty behaviour and its related aspects, in particular, brand duplication and brand switching and, finally, the product attribute profiles for each segment as they throw light on ethnic and white detergent information processing, as well as the associated loyalties to purchased brands.

SECTION 5:1

UK DETERGENT MARKET SIZE/VALUE

The detergent market comprises a market for '...all cleaning products, and includes in it, all textile washing preparations, dishwashing products, soaps, surface and general cleaners, including polishes and disinfectants' (Market Research Great Britain, 1980). The total cleaning products market was estimated at a retail sales value of £1.04 billion in 1980, as shown in Table 5:1, with a volume consumption of 841 thousand metric tonnes. The largest item in this product area comprises the laundry detergent washing powders, with an estimated consumption of 370 thousand metric tonnes in 1976, or 44.1% of the total detergent market, in volume terms. The figure registered an incremental increase of 2.6%, to 388.5 thousand metric tonnes by 1978 (Market Research Great Britain, 1980). In terms of retail sales, washing powders alone, have been valued at £247 million, or 86% of the total laundry detergent market (powders and synthetic liquids) of £287 million, with the figure for retail sales value estimated as the total cash paid at point of purchase by the consumer, and not the actual recommended retail price (Retail Business, 1971). Additionally, the value increased by 85% over the same five year period, due to price increases and inflationary trends. Even so, the market represents a fairly stable area of demand, with no relatively recent product growth.

TABLE 5:1

UK DETERGENT MARKET SIZE/VALUE

| <u>LAUNDRY DETERGENTS</u> | <u>RETAIL SALES</u>
(1979) | | <u>VOLUME CONSUMPTION</u>
(1976) | |
|---|-------------------------------|---|-------------------------------------|---|
| | £ m. | % OF
<u>LAUNDRY</u>
<u>DETERGENT</u>
<u>SECTOR</u> | M Tonnes
'000 | % OF
<u>CLEANING</u>
<u>PRODUCTS</u>
<u>SECTOR</u> |
| HEAVY DUTY WASHING POWDERS | £ 238 | 83% | 370.8 | 44.0 |
| LIGHT DUTY WASHING POWDERS | £ 9 | 3% | 1.5 | 0.2 |
| FABRIC CONDITIONERS | £ 34 | 12% | | |
| LAUNDRY SPRAYS | £ 2 | 1% | 2.0 | 0.2 |
| STARCHES | £ 4 | 1% | | |
| TOTAL LAUNDRY DETERGENT MARKET
(Textile washing powders
and synthetic liquids,
Rinsers, Soaps) | £ 287 | [100] | 374.3 | 44.4 |
| OTHER DETERGENTS
(Dishwashing powders &
liquids, Surface cleansers) | £ 752 | | 467.0 | 55.6 |
| TOTAL CLEANING PRODUCTS MARKET | £1,039 | | 841.3 | [100] |

SOURCE: EUROMONITOR ESTIMATES BASED ON BUSINESS MONITOR;
MARKET RESEARCH GREAT BRITAIN, 1977; 1980

These figures indicate that, within an area that has reached saturation level, buoyancy is being maintained mainly due to price increases.

Product developments during the 1970's, have instigated large brand share changes in the laundry detergents market due to the introduction, first, of enzyme biological powders and, later, of the automatic 'low suds' versions of standard

products. The competition in the market is thus intense and, many of the brands which once dominated the retail scene have given way to newer rivals (Table 5:2). According to the terms of the Retail Business Report, 1971, washing powders have, in this context been described as products, 'either heavy duty or light duty, used to wash clothes, rinsing powders being referred to as auxiliary powders'. Official Business Monitor statistics divide relevant washing powder products into two main classes, 'synthetic detergent powders' (made from chemicals from the oil industry), and 'soap-based' powders, with the majority of light duty products being 'soap-based', and heavy duty detergents being derived from synthetic chemicals (Mintel, 1977).

The long-standing supremacy of 'soap-powders' in the UK was first challenged in 1950, when Proctor & Gamble launched 'Tide', the first 'detergent' washing powder, followed by 'Daz', another P & G detergent, in 1951. Lever detergents, 'Surf', in 1951, and 'Omo' in 1952, followed. In 1956, 'Fairy Snow', was launched, as P & G's 'soap-powder' answer to 'Persil's (Lever), continued dominance. Next came 'Square Deal Surf', launched by Lever in 1962. By 1965 the 'synthetic', detergent washing powders were clearly pulling away market shares from previously existing 'soap powders'.

In response to pressure from the Prices and Incomes Board (1965), and the Monopolies Commission (1966), both P & G and

Lever, launched products reflecting government requests for a 40% reduction in selling expenses. P & G's 'Extra Value Tide', and Lever's 'Square Deal Surf' were therefore marketed. In 1968, a further new development came from Levers', in the form of 'Persil Automatic', a low-suds powder for automatic washing machines. In the same year, P & G and Lever test-marketed the biological, enzyme washing powders. P & G's 'Ariel', with an enzyme additive, was launched nationally in 1969, followed by Lever's enzyme powder, 'Drive', with a solvent base, both of which challenged the standard detergents. The competition was carried yet further, by test marketing and launching P & G's 'Bold', another low-suds product competing with Lever brand names, such as the biological 'Omo', and the low-suds 'Persil Automatic'.

At the end of May, 1969, Financial Times is quoted to have assessed the market impetus by reporting, that 'Ariel would appear to have moved ahead of Persil which has been the brand leader since the early 1950's.' The Economist Intelligence Unit (EIU), however, estimated that Persil was in the lead again by 1971.

In all this competitive activity, the innovative consumer swing towards automatic washing machines, was mainly responsible for the success of 'automatic' versions such as 'Persil automatic', 'Surf Automatic' (Lever's brands), and also 'Daz Automatic', 'Bold 2' (P & G brands), which heavily

eroded existing market shares for standard detergents as well as the biologicals. The former now constitute the main growth area, at 42% of washing powder sales, leaving 42% for standard versions and 18% for the biologicals.

TABLE 5:2

MANUFACTURERS' BRANDS, PRODUCT TYPE AND DATE OF LAUNCH

| <u>BRAND</u> | <u>MANUFACTURER</u> | <u>PRODUCT TYPE</u> | <u>DATE OF LAUNCH</u> |
|----------------------|---------------------|--------------------------|-----------------------|
| PERSIL | LEVER | SOAP POWDER | 1909 |
| TIDE | P & G | DETERGENT | 1950 |
| SURF | LEVER | DETERGENT | 1951 |
| DAZ | P & G | DETERGENT | 1951 |
| OMO | LEVER | DETERGENT | 1952 |
| FAIRY SNOW | P & G | SOAP POWDER | 1956 |
| SQUARE DEAL SURF | LEVER | DETERGENT | 1967 |
| SUNLIGHT SOAP POWDER | LEVER | SOAP POWDER | 1967 |
| EXTRA VALUE TIDE | P & G | DETERGENT | 1967 |
| OXYDOL | P & G | SOAP POWDER | 1967 |
| PERSIL AUTOMATIC | LEVER | LOW SUDSING
DETERGENT | 1968 |
| ARIEL | P & G | ENZYME | 1969 |
| RADIANT | LEVER | LOW SUDSING
DETERGENT | 1970 |
| BOLD | P & G | LOW SUDSING
DETERGENT | 1970 |
| BIOLOGICAL OMO | LEVER | ENZYME | 1970 |

SOURCE: RETAIL BUSINESS, 1971

Since the marketing innovations of the 'biological' powders, there have been no product developments of comparable significance. Colgate-Palmolive, the other giant in the cleaning products market, introduced 'Dynamo' in the 1970's,

with the paradoxical product description of 'liquid washing powder', to overcome traditional categories. Dynamo was launched in Scotland in 1977, and amazingly acquired a 4.4% market share Market Research Great Britain, 1977). Overall, however, the trends point to the fact that, with around 12 massively promoted brands, Levers' and P & G control about 90 per cent of this largely static market. The situation was assessed in Retail Business, 1980 reports, which remarked that, '... interestingly, although the United States and the advanced economies of Western Europe replaced soap powders with detergents years ago, the UK remains largely unconverted. Despite 20 years of hard effort by manufacturers, with millions of pounds spent in a Niagara of advertising and repeated mass sampling operations for both, detergents in the early 1950's and enzymes in 1969 and 1970, Britain's washing powder market brand leader by tonnage, remains a 'soap-powder', Persil, first launched in 1909.' The data on brand shares, in Table 5:3, thus indicate that 'Persil' (standard), with a brand share of 15%, and 'Persil automatic', with a brand share 15%, together constitute a 30% market share, representing the joint brand leader, with sales maintained, mainly due to the automatic version.

According to Target Group Index (TGI) findings, a clearer perspective of the situation, in terms of competition between brands was assessed as follows: '...though in tonnage terms, Persil is clear market brand leader, in terms of retail sales value, P & G's Ariel is probably market brand leader (22% of

the market). At retail sales, the higher priced enzyme powders (Radiant, Ariel, Biological Omo), would claim a larger slice of the market than the lower priced soap powders (Persil, Fairy Snow). In this market, it is difficult to exactly establish retail sales value...'

TABLE 5:3

BRAND SHARES: LAUNDRY DETERGENTS

| <u>MANUFACTURER</u> | <u>BRAND</u> | <u>MARKET SHARE</u>
(1979) |
|---------------------|---------------------------|-------------------------------|
| LEVER BROS. | PERSIL | 15% |
| | PERSIL AUTO | 9% |
| | SURF (STANDARD + AUTO) | 9% |
| | DRIVE (BIOLOGICAL) | 4% |
| TOTAL LEVER BROS. | | 44% |
| PROCTOR & GAMBLE | ARIEL (ENZYME BIOLOGICAL) | 11% |
| | DAZ | 12% |
| | DAZ AUTO | 9% |
| | BOLD (STANDARD & AUTO) | 6% |
| | FAIRY SNOW | 7% |
| TOTAL P & G | TIDE | 1% |
| | | 45% |
| OTHERS | | 11% |

SOURCE: EUROMONITOR CALCULATIONS; MARKET RESEARCH GREAT BRITAIN, 1980

Such a brand distribution implies a highly brand conscious market, maintained, ofcourse, by heavy advertising appropriations. Not surprisingly, the largest ad expenditure, as shown in Table 5:4, was also by Levers', on

the market leader, 'Persil Automatic'.

TABLE 5:4

ADVERTISING EXPENDITURE ON LAUNDRY DETERGENT BRANDS

| MANUFACTURER | BRAND | ADVERTISING EXPENDITURE | | | |
|------------------|-------------|-------------------------|-------|-------|-------|
| | | (1978) | | | |
| | | (£'000) | | | |
| | | TV | PRESS | TOTAL | % |
| | | £'000 | £'000 | £'000 | |
| LEVER BROS | PERSIL | 784 | 16 | 800 | 11 |
| | PERSIL AUTO | 1,595 | 30 | 1,625 | 22 |
| | SURE | 502 | 65 | 568 | 8 |
| | DRIVE | 585 | 42 | 627 | 9 |
| PROCTOR & GAMBLE | ARIEL | 906 | 9 | 915 | 13 |
| | DAZ | 499 | 4 | 503 | 7 |
| | DAZ AUTO | 355 | 3 | 359 | 5 |
| | BOLD | 943 | 9 | 952 | 13 |
| | FAIRY SNOW | 283 | 13 | 296 | 4 |
| | TOTAL | 7,038 | 240 | 7,278 | [100] |

SOURCE: MEAL MONTHLY DIGEST;
MGN MARKETING MANUAL OF THE UK, 1979, (p.346,533)

The expenditures are supported by both, Procter & Gamble and Levers, in the belief that maximum security of the markets can be acquired only if they appeal massively to the consumer. However, as Mintel, 1980 reports commented, '...at the best of times, this marketing philosophy is an expensive one...'. In fact, one of the Monopolies Commission's most persistent criticisms of washing powder sales in 1967, was

that 25% of the retail price was a 'selling cost' covering research, advertising and promotion costs. The cost skyrocketed over 1967-1969, as both manufacturers launched two entirely new names, Ariel and Radiant. The effectiveness of such promotional expenditures was summarised in Mintel's, 1980 ascerbic remark that '...with Persil's indestructible name, attracting the consumer is relatively painless. With a new product a very expensive financial headache..'.
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Despite these expenditure patterns, both Levers' and P. & G are reported (MGN Marketing Manual, 1979) as believing that some brands are undersupported. The fact bears out in the data reported in Table 5:4, which show that Proctor & Gamble brands, 'Daz' and 'Fairy Snow', have considerably lower advertising appropriations in comparison to Lever's 'Persil'.  
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Considering that market shares of brands are maintained by their advertising expenditures, it behooves the marketer to verify whether ethnic consumers constitute segments that require separate promotions. Additionally, it would be interesting to find out whether brands with lower advertising expenditures are, in any way, significant within the ethnic markets.

PART 1

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### SECTION 5:2

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EMPIRICAL EVIDENCE ON ETHNIC DETERGENT PURCHASING

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The major findings on detergent purchasing with regard to the ethnic and white consumer segments, reported in Tables 5:5 and 5:6, are discussed below. The evidence centres on the purchase characteristics of the Asian and West Indian ethnic markets, as they compare with the white consumer market, and their impact on the segment contributions to the various brands.

#### DETERGENT MARKET CONTROL

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Laundry detergent purchasing in the Asian ethnic segment, was found controlled by a proportion of 68 per cent male buyers, and only 32 per cent female buyers ($\chi^2 = 106.53$, $p < .001$). This was in significant contrast to the white segment, where female buyers constituted 98 per cent of the regular purchasing agents. The West Indian ethnic group contained a proportion of 95 per cent female buyers, and thus appeared similar to white consumers in terms of market control, but different from the Asian ethnic segment with which it is usually categorised. Regular detergent purchasing agents thus differed significantly for Asian ethnic and white consumers, but not for the West Indian ethnic group.

ETHNIC PURCHASING LEVELS BY AGE STRUCTURE

The evidence indicated that a significantly greater proportion of Asian, in comparison to white buyers (30%:10%), were concentrated in the 25-34 yrs ($X^2=13.61$, $p \leq .001$) and, also (48%:31%), in the 35-44 yrs ($X^2=7.45$, $p \leq .01$), age categories. Consequently, it was axiomatic that the overall age distributions would also be significantly different.

Though the direction was the same for the West Indian ethnic group, the difference was not significant in this latter case, except for the 45-54 yrs age category, which had a ratio of 36%:20%, ($X^2=3.72$, $p \leq .10$).

ETHNIC PURCHASING LEVELS BY SOCIAL CLASS

The proportion of consumers indicated in the 'D/E', blue collar, skilled manual socioeconomic category was significantly greater in the case of the Asian ethnic in comparison to the white group, at 82%:56%, ($X^2=26.46$, $p \leq .001$). West Indian ethnic consumers evinced a significantly higher proportion in the 'F' blue collar, manual category at 14%:6%, ($X^2=2.91$, $p \leq .10$), while white consumers in comparison, tended to predominate in the 'C1/C2' white collar, occupational class structure.

TABLE 5:5

DETERGENT PURCHASING IN THE ASIAN ETHNIC SEGMENT

| | <u>WHITE</u> | | <u>ASIAN</u> | | <u>X²</u> | <u>SIG. LEVEL</u> | <u>DIRECTION</u> |
|---|--------------|-------|--------------|-------|----------------------|-------------------|------------------|
| | (N=86) | | (N=200) | | | | |
| | N | % | N | % | | | |
| <u>MARKET CONTROL</u> | | | | | | | |
| MALE BUYERS | 2 | 2 | 136 | 68 | 106.53 | .001 | ASIAN |
| FEMALE BUYERS | 84 | 98 | 64 | 32 | 106.53 | .001 | WHITE |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>AGE-GROUP OF BUYERS</u> | | | | | | | |
| 15-24 yrs | 5 | 6 | 11 | 6 | 0.03 | NS | - |
| 25-34 yrs | 9 | 10 | 60 | 30 | 13.60 | .001 | ASIAN |
| 35-44 yrs | 27 | 31 | 96 | 48 | 7.45 | .01 | ASIAN |
| 45-54 yrs | 17 | 20 | 10 | 5 | 13.66 | .001 | WHITE |
| 55-64 yrs | 15 | 17 | 20 | 10 | 1.89 | NS | - |
| 65+ yrs | 13 | 15 | 3 | 1 | 18.60 | .001 | WHITE |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>SOCIAL CLASS OF BUYERS</u> | | | | | | | |
| AB | 4 | 5 | 6 | 3 | 0.12 | NS | - |
| C1/C2 | 29 | 33 | 20 | 10 | 22.19 | .001 | WHITE |
| DE | 48 | 56 | 164 | 82 | 26.46 | .001 | ASIAN |
| F | 5 | 6 | 10 | 5 | 0.01 | NS | - |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>DETERGENT PURCHASE FREQUENCY</u> | | | | | | | |
| WEEKLY | 30 | 35 | 106 | 53 | 2.02 | NS | - |
| FORTNIGHTLY | 36 | 42 | 40 | 20 | 6.42 | .05 | WHITE |
| MONTHLY | 18 | 21 | 28 | 14 | 1.65 | NS | - |
| ONCE IN 3-6 mths | 2 | 2 | 26 | 13 | 9.01 | .01 | ASIAN |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>PACK SIZE PENETRATION</u> | | | | | | | |
| E-10 (LARGE) | 5 | 6 | 78 | 39 | 33.78 | .001 | ASIAN |
| E-3 (MEDIUM) | 81 | 94 | 122 | 61 | 33.78 | .001 | WHITE |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>AVERAGE PURCHASE BRAND PENETRATION</u> | | | | | | | |
| PERSIL | 26 | 30 | 40 | 20 | 0.001 | NS | - |
| DAZ | 13 | 15 | 126 | 63 | 76.15 | .001 | ASIAN |
| FAIRY | 11 | 13 | 54 | 27 | 16.12 | .001 | ASIAN |
| ARIEL | 40 | 47 | 34 | 17 | 8.49 | .01 | WHITE |
| SURF | 11 | 13 | 2 | 1 | 10.16 | .01 | WHITE |
| PRIVATE BRANDS | 60 | 70 | 2 | 1 | 101.80 | .001 | WHITE |
| | N=161 | [188] | N=258 | [129] | | | |

TABLE 5:5 (CONTD)

| | <u>WHITE</u> | | <u>ASIAN</u> | | <u>X²</u> | <u>SIG.</u>
<u>LEVEL</u> | <u>DIRECTION</u> |
|-----------------------------------|--------------|-------|--------------|-------|----------------------|-----------------------------|------------------|
| | N | % | N | % | | | |
| <u>BRAND LOYALTY</u> | | | | | | | |
| PERSIL | 24 | 28 | 30 | 15 | 5.72 | .05 | WHITE |
| DAZ | 9 | 10 | 90 | 45 | 33.23 | .001 | ASIAN |
| FAIRY | 6 | 7 | 26 | 13 | 2.84 | .10 | ASIAN |
| ARIEL | 27 | 31 | 14 | 7 | 27.19 | .001 | WHITE |
| SURF | 6 | 6 | 2 | 1 | 2.32 | NS | - |
| | N=72 | [82] | N=162 | [81] | | | |
| DUAL BRAND LOYALTY | 29 | [33] | 74 | [37] | 1.93 | NS | - |
| BRAND SWITCHING | 14 | 16 | 46 | 23 | 2.06 | NS | - |
| BRAND REPETITION | 72 | 84 | 154 | 77 | 2.06 | NS | - |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>INFREQUENT BRAND USAGE</u> | | | | | | | |
| PERSIL | 18 | 21 | 40 | 20 | 0.04 | NS | - |
| DAZ | 18 | 21 | 41 | 21 | 0.04 | NS | - |
| FAIRY | 9 | 10 | 22 | 11 | 0.24 | NS | - |
| ARIEL | 51 | 59 | 60 | 30 | 15.02 | .001 | WHITE |
| SURF | 15 | 17 | 80 | 40 | 15.62 | .001 | ASIAN |
| | N=111 | [128] | N=243 | [122] | | | |
| <u>NON-USERS OF BRAND</u> | | | | | | | |
| PERSIL | 41 | 47 | 120 | 60 | 3.42 | .10 | ASIAN |
| DAZ | 54 | 63 | 34 | 17 | 41.27 | .001 | WHITE |
| FAIRY | 66 | 77 | 134 | 67 | 0.35 | NS | - |
| ARIEL | 2 | 2 | 106 | 53 | 52.38 | .001 | ASIAN |
| SURF | 60 | 70 | 100 | 50 | 3.55 | .10 | WHITE |
| | N=223 | [259] | N=494 | [247] | | | |
| <u>RETAIL OUTLET</u> | | | | | | | |
| ETHNIC INDEPENDENT | 2 | 2 | 116 | 58 | 79.23 | .001 | ASIAN |
| SUPERMARKET | 15 | 17 | 54 | 27 | 3.54 | .10 | ASIAN |
| DISCOUNT CHAIN | 69 | 81 | 30 | 15 | 110.20 | .001 | WHITE |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>INFORMATION SOURCE</u> | | | | | | | |
| PERSONAL USAGE | 70 | 81 | 40 | 20 | 93.2 | .001 | WHITE |
| COMMERCIAL SOURCE/
ADVERTISING | 14 | 17 | 3 | 1 | 20.9 | .001 | WHITE |
| NON-MARKET SOURCE/
FRIENDS | 1 | 1 | 105 | 53 | 70.16 | .001 | ASIAN |
| MARKET/RETAILERS | 1 | 1 | 52 | 26 | 26.24 | .001 | ASIAN |
| | N=86 | [100] | N=200 | [100] | | | |

* PERCENTAGES DO NOT ALWAYS ADD UP TO [100] BECAUSE OF
MULTIPLE CLAIMS

TABLE 5:6

DETERGENT PURCHASING IN THE WEST INDIAN ETHNIC SEGMENT

| | <u>WHITE</u> | | <u>WEST INDIAN</u> | | <u>X²</u> | <u>SIG.</u> | <u>DIRECTION</u> |
|---------------------------|--------------|----|--------------------|----|----------------------|--------------|------------------|
| | (N=86) | | (N=22) | | | <u>LEVEL</u> | |
| | N | % | N | % | | | |
| <u>MARKET CONTROL</u> | | | | | | | |
| MALE BUYERS | 2 | 2 | 1 | 5 | 1.67 | NS | - |
| FEMALE BUYERS | 84 | 98 | 21 | 95 | 1.67 | NS | - |
| | N=86 [100] | | N=22 [100] | | | | |
| <u>AGE-GROUP</u> | | | | | | | |
| 15-24 yrs | 5 | 6 | 2 | 9 | 1.08 | NS | - |
| 25-34 yrs | 19 | 10 | 3 | 14 | 0.34 | NS | - |
| 35-44 yrs | 7 | 31 | 7 | 32 | 0.087 | NS | - |
| 45-54 yrs | 17 | 20 | 8 | 36 | 3.72 | .10 | WEST INDIAN |
| 55-64 yrs | 5 | 17 | 2 | 9 | 0.94 | NS | - |
| 65+ yrs | 13 | 15 | - | - | - | - | - |
| | N=86 [100] | | N=22 [100] | | | | |
| <u>SOCIAL CLASS</u> | | | | | | | |
| AB | 4 | 5 | 1 | 5 | .29 | NS | - |
| C1/C2 | 29 | 33 | 4 | 18 | 1.04 | NS | - |
| DE | 48 | 56 | 14 | 63 | .82 | NS | - |
| F | 5 | 6 | 3 | 14 | 2.91 | .10 | WEST INDIAN |
| | N=86 [100] | | N=22 [100] | | | | |
| <u>DETERGENT PURCHASE</u> | | | | | | | |
| <u>FREQUENCY</u> | | | | | | | |
| WEEKLY | 36 | 35 | 11 | 50 | 0.86 | NS | - |
| FORTNIGHTLY | 30 | 42 | 6 | 27 | 0.178 | NS | - |
| MONTHLY | 18 | 21 | 3 | 14 | 0.22 | NS | - |
| ONCE IN 3-6 mths | 2 | 2 | 2 | 9 | 4.54 | .05 | WEST INDIAN |
| | N=86 [100] | | N=22 [100] | | | | |
| <u>PACK SIZE</u> | | | | | | | |
| <u>PENETRATION</u> | | | | | | | |
| E-10 (LARGE) | 5 | 6 | 5 | 23 | 8.14 | .01 | WEST INDIAN |
| E-3 (MEDIUM) | 81 | 94 | 17 | 77 | 8.14 | .01 | WHITE |
| | N=86 [100] | | N=22 [100] | | | | |
| <u>AVERAGE PURCHASE</u> | | | | | | | |
| <u>BRAND PENETRATION</u> | | | | | | | |
| PERSIL | 26 | 30 | 5 | 23 | .25 | NS | - |
| DAZ | 13 | 15 | 8 | 36 | 12.32 | .001 | WEST INDIAN |
| FAIRY | 11 | 13 | 1 | 5 | .054 | NS | - |
| ARIEL | 40 | 47 | 8 | 36 | .43 | NS | - |
| SURF | 11 | 13 | 5 | 23 | 5.29 | .05 | WEST INDIAN |
| PRIVATE BRANDS | 60 | 70 | 1 | 5 | 10.89 | .001 | WHITE |
| | N=161 [188] | | N=28 [128] | | | | |

TABLE 5:6 (CONTD)

| | <u>WHITE</u> | | <u>WEST INDIAN</u> | | <u>X²</u> | <u>SIG. LEVEL</u> | <u>DIRECTION</u> |
|-------------------------------|--------------|-------|--------------------|-------|----------------------|-------------------|------------------|
| | N | % | N | % | | | |
| <u>BRAND LOYALTY</u> | | | | | | | |
| PERSIL | 24 | 28 | 3 | 14 | 0.67 | NS | - |
| DAZ | 2 | 10 | 2 | 9 | 0.042 | NS | - |
| FAIRY | 6 | 7 | 1 | 5 | 0.0052 | NS | - |
| ARIEL | 27 | 31 | 1 | 5 | 5.25 | .05 | WHITE |
| SURF/OTHERS | 6 | 6 | 1 | 5 | 0.29 | NS | - |
| <u>DUAL BRAND LOYALTY</u> | | | | | | | |
| | N=72 | [82] | N=8 | [38] | | | |
| | 29 | [33] | 10 | [49] | 2.34 | NS | - |
| <u>BRAND SWITCHERS</u> | | | | | | | |
| | 15 | 16 | 14 | 64 | 21.45 | .001 | WEST INDIAN |
| <u>BRAND REPETITION</u> | | | | | | | |
| | 72 | 84 | 8 | 36 | 21.45 | .001 | WHITE |
| | N=86 | [100] | N=22 | [100] | | | |
| <u>INFREQUENT BRAND USERS</u> | | | | | | | |
| PERSIL | 18 | 21 | 2 | 9 | 1.54 | NS | - |
| DAZ | 18 | 21 | 13 | 59 | 8.87 | .01 | WEST INDIAN |
| FAIRY | 9 | 10 | 1 | 5 | 0.43 | NS | - |
| ARIEL | 51 | 59 | 3 | 14 | 0.183 | NS | - |
| SURF | 15 | 17 | 15 | 68 | 0.0014 | NS | - |
| | N=111 | [128] | N=34 | [155] | | | |
| <u>NON-USERS OF BRAND</u> | | | | | | | |
| PERSIL | 41 | 47 | 11 | 50 | 0.43 | NS | - |
| DAZ | 54 | 63 | 5 | 23 | 4.50 | .05 | WHITE |
| FAIRY | 66 | 77 | 18 | 82 | 0.76 | NS | - |
| ARIEL | 60 | 2 | 7 | 32 | 3.44 | .10 | WEST INDIAN |
| SURF | 2 | 70 | 11 | 50 | 43.04 | .001 | WHITE |
| | N=223 | [259] | N=52 | [237] | | | |
| <u>RETAIL OUTLET</u> | | | | | | | |
| ETHNIC INDEPENDENT | 2 | 2 | 3 | 14 | 7.96 | .01 | WEST INDIAN |
| SUPERMARKET | 18 | 17 | 6 | 23 | 1.79 | NS | - |
| DISCOUNT CHAIN | 69 | 81 | 63 | 13 | 3.23 | .10 | WHITE |
| | N=86 | [100] | N=22 | [100] | | | |
| <u>INFORMATION SOURCE</u> | | | | | | | |
| PERSONAL USAGE | 70 | 81 | 19 | 86 | 0.74 | NS | - |
| COMMERCIAL/ | | | | | | | |
| ADVERTISING | 14 | 17 | 2 | 9 | 0.26 | NS | - |
| NON-MARKET/FRIENDS | 1 | 1 | 1 | 5 | 1.67 | NS | - |
| MARKET/RETAILERS | 1 | 1 | - | - | - | - | - |
| | N=86 | [100] | N=22 | [100] | | | |

* PERCENTAGES DO NOT ALWAYS ADD UP TO [100] BECAUSE OF MULTIPLE CLAIMS

ETHNIC PURCHASE FREQUENCIES

Purchase frequencies were measured as the proportions of consumers in each group, who made purchases at periods of 'weekly', 'fortnightly', 'monthly', and 'once in 3-6 months' intervals. It was found that larger proportions of Asian (53 per cent), and West Indian (50 per cent), ethnic consumers purchased at weekly intervals, in comparison to 35 per cent for white consumers, though the differences were not statistically significant.

The proportion of white buyers making 'fortnightly' purchases was significantly greater than for the Asian ethnic group (42 per cent as compared to 20 per cent), with $X^2=6.42$, $p < .05$, but the comparison was not significant for the West Indian ethnic group, though in the same direction. Significantly, a larger proportion, 13 per cent, of the Asian ethnic group ($X^2=9.01$, $p < .01$), and also the West Indian ethnic group, 9 per cent ($X^2=4.54$, $p < .05$), purchased at long interval periods of 'once in 3-6 months', compared to white buyers who constituted 2 per cent in this purchase category. These findings highlight the fact that detergent purchasers in the case of both, Asian and the West Indian ethnic groups tend to purchase either at short 'weekly' intervals or extremely long 'three to six-monthly' intervals, in contrast to white consumers who purchase predominantly on a 'fortnightly' time basis.

ETHNIC PACK SIZE PENETRATION

Pack-size penetration was measured as the proportion of buyers, claiming to regularly purchase a given pack size. Tables 5:5 and 5:6 dramatise the penetration of the different pack sizes within the ethnic and white consumer segments. The findings provide evidence of the significantly higher proportion of Asian ethnic consumers (39 per cent), who claimed to have regularly purchased the large, E-10 pack size in comparison to 6 per cent for the white group, with $X^2=33.78$, and a significance level of $p < .001$. The proportion purchasing this larger pack was also significantly greater for the West Indian ethnic group (23 per cent), when compared to the stated 6 per cent in the white consumer segment, with $X^2=8.14$, $p < .01$.

These findings do not obviate the fact that, a greater number of consumers in each group purchased the medium (E-3), pack size, which had consumer proportions of the order, White (94%), Asian (61%), West Indian (77%).

ETHNIC BRAND PENETRATION LEVELS

Brand penetration was measured as the proportion of consumers who claimed to be 'current' purchasers of a brand, i.e., as the sum of consuming units in the 'always buy', 'frequently buy' and 'occasionally buy' categories. In this, the

procedure was similar to that used for brand penetration investigations by Ehrenberg, 1967. The evidence took the following form:-

1. The white consumer segment had significantly higher brand penetration levels (47 per cent) for P & G's 'Ariel', compared to 17 per cent in the Asian ethnic group ($X^2=8.49$, $p \leq .01$), and also with regard to Lever's 'Surf' (13 per cent as compared to 1 per cent), with $X^2=10.16$, and $p \leq .01$. There was also a higher penetration in the white group, for 'private label' brands (70 per cent), compared to 1 per cent for the Asian ethnic segment, with $X^2=101.8$ and $p \leq .001$.
2. The Asian ethnic group was characterised by significantly higher brand penetration (63 per cent) for P & G's 'Daz', compared to the white consumer market (15 per cent), ($X^2=76.15$, $p \leq .001$), and also for P & G's 'Fairy Snow' (27 per cent), in comparison to 13 per cent for the white group, with $X^2=16.02$, $p \leq .001$.
3. The West Indian ethnic group similarly had significantly higher brand penetration levels for P & G's 'Daz' (36 per cent), compared to the white group (13 per cent), with $X^2=12.32$, $p \leq .001$) and additionally, for Lever's 'Surf' (23 per cent as compared to 13 per cent), with $X^2=5.29$ and $p \leq .05$.

ETHNIC BRAND LOYALTIES

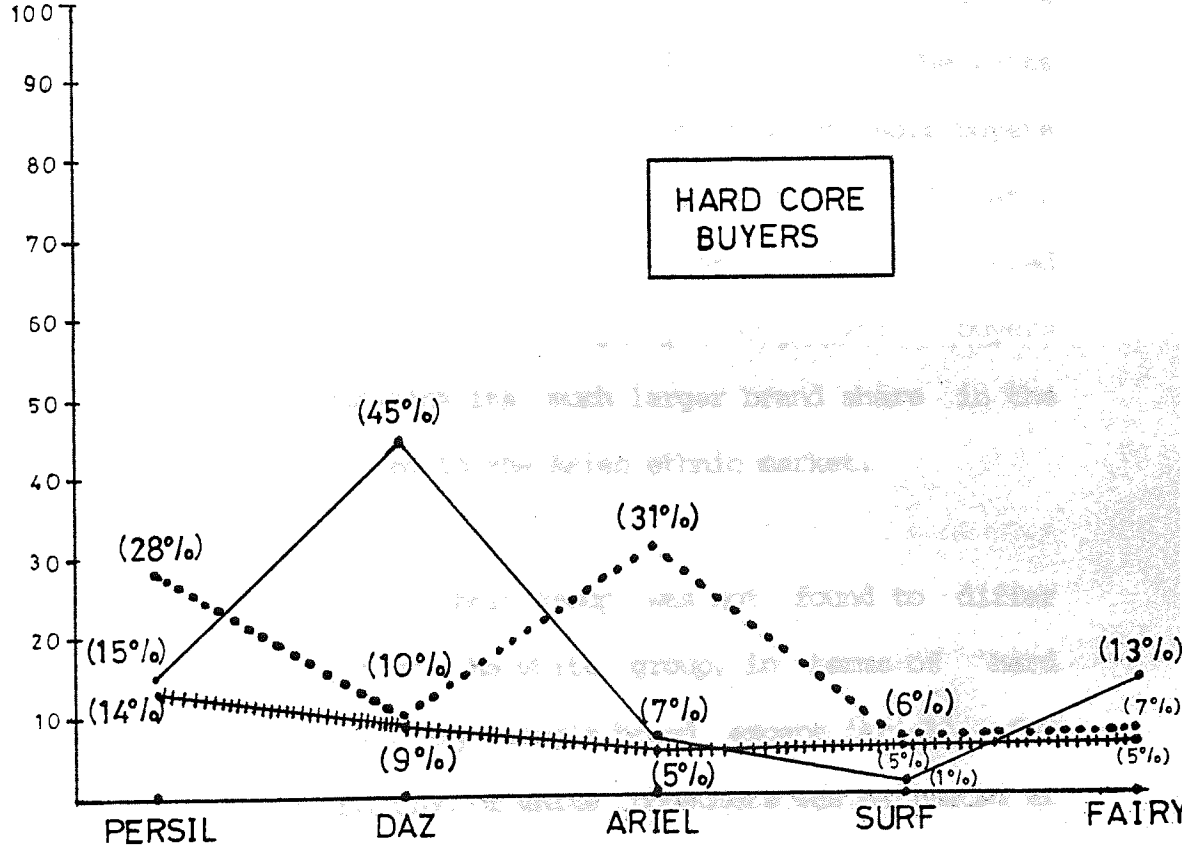
Single brand loyalty was measured as the proportion in each group, for the 'always buy' category. This approach was similar to that used by Ehrenberg, 1967, in the measurement of the 'sole buyer' category as representing 'hard core', brand loyal buyers who, in an analysis period covering a four week span, purchase only a single brand.

The procedure used in the present study was, moreover, an operationalisation of brand loyalty analogous to that based on consumer panel data, which allows brand loyalty to be measured as the proportion of purchases devoted to the brand most frequently purchased (Cunningham, 1956; Massy, Frank and Lodahl, 1968), and also the brand loyalty 'sequence based' definitions (Tucker, 1964; McConnel, 1968), which require three or four consecutive purchases of the same brand as a criterion of loyalty. An element of subjectivity is obviously evident in all previous conceptualisations (Jacoby and Kyner, 1973), as well as in the present approximation. This, however, was justified by the purpose of the investigation, which was to comparably measure brand loyalties for ethnic and white consumers, so as to make reasonably good predictions on their future brand purchasing behaviour. Tables 5:5 and 5:6 display the brand loyalties to individual brands, for the Asian and West Indian ethnic groups. The findings are also depicted graphically in Figure 5:1 overleaf:-

FIGURE 5:1

DETERGENT BRAND SHARES IN THE ETHNIC MARKETS

PERCENTAGE



KEY: WHITE
 ASIAN ETHNIC —————
 WEST INDIAN ETHNIC ++++++

SOURCE: Adapted from 'Brand Loyalty-what, where, how much?',
 Cunningham, C.R., Harvard Business Review, 1956,
 Vol.34, p.120

On the basis of the evidence, it was obvious that:-

1. A significantly higher proportion of the Asian ethnic group (45 per cent), were brand loyal to P & G's 'Daz', in comparison to the white consumer segment, with $X^2=33.23$ and $p < .001$. This difference was not observed for the West Indian ethnic group, in reference to any single brand. The Asian ethnic group also had a significantly higher proportion of 'hard core buyers' for P & G's 'Fairy Snow' at 13%:7%, ($X^2=2.24$, $p < .10$). The white consumer market had a greater proportion of sole buyers for Lever's 'Persil' (28 per cent), with $X^2=5.72$, at $p < .05$. 'Ariel' was another brand that figured significantly in brand loyalty among white buyers (31%:7%), indicating its much larger brand share in the white, as compared to the Asian ethnic market.

2. The West Indian ethnic group was not found to differ significantly from the white group, in terms of 'hard core buyers' for any single brand except 'Ariel', for which the proportion of white consumers was estimated at 31 per cent, in comparison to 5 per cent for the West Indian ethnic group ($X^2=5.25$, $p < .05$).

DUAL BRAND LOYALTY

Dual brand loyalty was measured as the proportion of consumers in the 'frequently buy' and 'occasionally buy'

categories. This was in contrast to the measurement of single brand loyalty, as the proportion of consumers only in the 'always buy' category. The procedure used was thus an approximation to dual brand loyalty measured from consumer panel data, as the 'proportion of purchases devoted to the two most frequently purchased brands' (Cunningham, 1958), in a four week period.

The evidence indicated that differences were not significant either between Asian ethnic and white groups, in the proportion of consumers claiming loyalty to two brands (37% and 33% respectively) or for West Indian ethnic and white consumers (49% and 33% respectively).

BRAND SWITCHING PATTERNS

Brand switching was measured as the proportion of consumers who claimed to have recently purchased a different brand from the one purchased previously. The proportion who brand switched in the Asian ethnic group (23 per cent), did not differ significantly in comparison to that for the white consumer group (16 per cent), with $X^2=2.06$, $p=NS$. However a significantly higher proportion, 64 per cent, claimed to have brand switched in the West Indian ethnic segment, in comparison to 16 per cent for the white group ($X^2=21.45$, $p<.001$).

ETHNIC BRAND DUPLICATION PATTERNS

Brand duplication was measured as the duplication of the most favoured ('always buy') brand, by the brands in the 'frequently bought' and 'occasionally bought' categories. The measure was again similar to previously used techniques for brand duplication (Ehrenberg, 1968). The tendency for brand duplication, in order of decreasing popularity of brands within the segments, was obtained accordingly, for ethnic and white consumers. The proportion of consumers indicated by the percentages in the diagonals of Tables 5:7, 5:8 and 5:9 give the maximum penetration of the brand within the segment.

It should be noted that, while the brand 'penetration' figures estimated in Tables 5:5 and 5:6 gave indications of the potential for individual manufacturers brands within the segments, the brand 'duplication' figures had the additional advantage of displaying the relative popularity among the ethnic and white groups, achieved by the various brands.

Comparisons of the brand duplication patterns for ethnic and white consumers, gave the following main facts:-

1. The white segment had high brand penetration levels for 'Ariel' (47.2%) and 'Persil' (30.3%). In addition however, a greater proportion of 'Ariel' buyers, tended to duplicate it with 'Fairy' (5.9%), than 'Daz' (4.7%).

TABLE 5:7

BRAND DUPLICATION PATTERN FOR WHITE CONSUMERS

| <u>CONSUMERS</u> | | <u>AND ALSO BUYING</u> | | |
|------------------|--------------|------------------------|------------|--------------|
| <u>BUYING</u> | <u>ARIEL</u> | <u>PERSIL</u> | <u>DAZ</u> | <u>FAIRY</u> |
| | % | % | % | % |
| ARIEL | [47.2] | 2.4 | 4.7 | 5.9 |
| PERSIL | 2.4 | [30.3] | 2.4 | 2.4 |
| DAZ | 4.7 | 4.7 | [15.7] | 4.7 |
| FAIRY | 5.9 | 5.9 | 5.9 | [12.9] |

* BRACKETED PERCENTAGES INDICATE MAXIMUM PENETRATION FOR BRAND

TABLE 5:8

BRAND DUPLICATION IN THE ASIAN ETHNIC SEGMENT

| <u>CONSUMERS</u> | | <u>AND ALSO BUYING</u> | | | |
|------------------|--------|------------------------|--------------|---------------|--------------|
| <u>BUYING</u> | | <u>DAZ</u> | <u>FAIRY</u> | <u>PERSIL</u> | <u>ARIEL</u> |
| | | % | % | % | % |
| DAZ | [63.2] | | 3.4 | 4.4 | 9.9 |
| FAIRY | 3.4 | | [26.7] | 3.4 | 3.4 |
| PERSIL | 4.4 | | 4.4 | [19.9] | 4.4 |
| ARIEL | 9.9 | | 9.9 | 9.9 | [16.6] |

* BRACKETED PERCENTAGES INDICATE MAXIMUM PENETRATION FOR BRAND

TABLE 3:9

BRAND DUPLICATION IN THE WEST INDIAN SEGMENT

| | <u>CONSUMERS</u>
<u>BUYING</u> | <u>AND ALSO BUYING</u> | | |
|--------|-----------------------------------|------------------------|--------------------|------------------|
| | <u>ARIEL</u>
% | <u>DAZ</u>
% | <u>PERSIL</u>
% | <u>SURF</u>
% |
| ARIEL | [36.0] | 18.2 | 18.1 | 33.7 |
| DAZ | 18.2 | [35.6] | 18.2 | 18.2 |
| PERSIL | 18.1 | 18.2 | [22.9] | 18.1 |
| SURF | 33.7 | 18.2 | 18.1 | [22.6] |

* BRACKETED PERCENTAGES INDICATE MAXIMUM PENETRATION FOR BRAND

- The Asian ethnic segment was characterised by high brand penetration levels for 'Daz' (63.2%), and also for 'Fairy' (26.7%). However duplication with a second brand was favoured most by 'Ariel' (9.9%), rather than 'Persil' (4.4%), the brand leader in the white segment, or even by 'Fairy Snow' (3.4%), which did not serve as a duplicated brand among Asian ethnic consumers but appears, rather, to have achieved significant penetration within a small group of 'hard-core' buyers in this segment.
- The West Indian ethnic group was characterised by high brand penetration levels for 'Ariel' (36%), and also 'Daz' (35.6%). The brand used for duplication by the largest proportion of consumers in this group was 'Surf' (33.7%), rather than 'Persil' (18.1%) or 'Daz' (18.2%)

The contrasting duplication patterns above, indicate that duplication was highest within the West Indian group with 'Surf' (33.7%); used most for duplication as a second brand choice. Brand duplication in the Asian ethnic segment with 'Ariel' (9.9%), was again different from that for white consumers where 'Fairy Snow' (5.9%), served as the duplicated brand for the largest proportion of consumers.

An important aspect of these duplication patterns, is the fact that, the less the 'hard-core' brand loyalty for the brand, the greater its tendency to serve as a 'substitute' brand for duplication purposes. In the case of the Asian ethnic group for instance, the brand with the second highest brand loyalty figures, 'Persil' (15%), as shown in Table 5:5, was different from the brand ('Ariel'), used for duplication purposes. The existing market situation can thus be considered in terms of two brands by the same manufacturer, 'Daz' (P & G), and 'Ariel' (P & G), serving a complementary function, but brands such as 'Daz' (P & G) and 'Persil' (Lever), more competitive than complementary within this market segment. Similar observations for the West Indian market indicated that while 'Persil' was the market leader, brand names such as 'Daz' (P & G) and 'Persil' (Lever) were competitive with regard to their market shares, but 'Persil' (Lever) and 'Ariel' (P & G) serve a complementary function, despite being promoted by competing manufacturers.

These findings suggest that 'Persil' (Lever), and 'Daz'

(Proctor and Gamble), have large, competitive market shares within both, the Asian and West Indian ethnic markets. 'Daz' (P & G) however, has a more entrenched market share in the Asian ethnic segment. In comparison, 'Persil' (Lever), retains the competitive edge in the West Indian ethnic segment, and was thus similar in its leading position for the white consumer market,

CURRENT NONUSAGE OF BRANDS

The levels of 'non usage' for the different brands, were recorded as the proportion of consumers in the 'not know whether I would buy' category for brand purchasing. According to the findings, 'Ariel' had a significantly greater proportion of non-users in the Asian ethnic group (53 per cent), compared to 2 per cent nonusers among white consumers ($X^2=52.38$, $p < .001$). A similar trend was observed for non-usage of 'Persil' in the Asian group (60 per cent), in comparison to 47 per cent for the white group, but the difference was not highly significant ($p < .10$). Existing non-usage in the case of the white group was significantly higher for 'Daz' (63 per cent), compared to the Asian ethnic group (17 per cent), with $p < .001$, where the brand was marked by a high level of repeat purchasing behaviour.

Within the West Indian ethnic group, non-users for a brand were significantly higher only in the case of 'Ariel' (32 per cent), compared to 2 per cent in the white group, this

difference being observed significant, only at the $p < .10$ level.

IMPORTANCE OF PRODUCT ATTRIBUTES

The ethnic and white segments were empirically analysed for brand preferences, on the basis of relative importance given to product attributes. Mean ratings were obtained, for eleven product attributes that were specific to laundry detergents (Murphy, Kangun and Locander, 1978). These were 'brand name', 'cleaning ability', 'whitening capacity', 'product price', 'pack-size', 'quantity per load', 'mildness to clothes', 'mildness to skin', 'sudsinness', 'product fragrance', and 'recommendation by friends'. The profiles for the mean ratings (Tables 5:10 and 5:11), for the Asian and West Indian ethnic groups in comparison to the white group, are displayed in Appendix B:2. The results indicated that:-

1. The white group rated 'cleaning capacity' as significantly higher at 4.97, in comparison to the Asian ethnic rating of 4.60, with $p < .001$.
2. Asian ethnic consumers rated 'whitening capacity' as significantly more important at 4.56, in comparison to the white consumer rating of 4.15, ($p < .001$).
3. Asian ethnic consumers rated detergent 'sudsinness' as significantly more important at 3.75, compared to a rating of 3.13 by white consumers, with $p < .001$.

TABLE 5:10

MEAN IMPORTANCE RATINGS FOR DETERGENT ATTRIBUTES
 ~~~~~  
 IN THE ASIAN ETHNIC SEGMENT  
 ~~~~~

| DETERGENT
ATTRIBUTE | WHITE
MEAN
(N=86) | ASIAN ETHNIC
MEAN
(N=60) | 't' VALUE | SIG.
LEVEL | DIRECTION |
|------------------------------|-------------------------|--------------------------------|-----------|---------------|-----------|
| CLEANING CAPACITY | 4.97 | 4.60 | -5.72 | .001 | WHITE |
| WHITENING CAPACITY | 4.15 | 4.56 | 4.94 | .001 | ASIAN |
| SUDSINESS | 3.13 | 3.75 | 5.66 | .001 | ASIAN |
| MILDNESS TO CLOTHES | 4.04 | 3.61 | -5.33 | .001 | WHITE |
| MILDNESS TO SKIN | 4.11 | 3.95 | -1.57 | NS | - |
| QUANTITY PER LOAD | 3.26 | 3.38 | 1.01 | NS | - |
| PRODUCT PRICE | 3.29 | 3.53 | 2.60 | .01 | ASIAN |
| BRAND NAME | 2.96 | 2.85 | -3.01 | .01 | WHITE |
| RECOMMENDATION
BY FRIENDS | 2.65 | 2.98 | -3.01 | .01 | ASIAN |
| PACK SIZE | 3.17 | 3.28 | 0.77 | NS | - |
| DETERGENT FRAGRANCE | 3.04 | 3.66 | 6.95 | .001 | ASIAN |

* A VALUE OF '1' = 'V UNIMPORTANT', '5' = 'V IMPORTANT'

4. The Asian ethnic group rated 'detergent price', as significantly more important ($p < .01$), at 3.53, compared to the white rating of 3.29, and 'brand name' significantly less (2.85:2.96), $p < .01$.
5. Asian ethnic consumers rated 'recommendation by friends' as significantly more important at 2.98, in comparison to the white rating of 2.65, with $p < .01$. The comparison was not significant for the West Indian ethnic rating of 2.45.
6. The Asian ethnic group rated 'detergent fragrance' at 3.66. This was significantly higher than the rating of 3.04 by the white group, with $p < .001$.

TABLE 5:11

MEAN IMPORTANCE RATINGS FOR DETERGENT ATTRIBUTES
 IN THE WEST INDIAN ETHNIC SEGMENT

| DETERGENT
ATTRIBUTE | WHITE
MEAN
(N=86) | WEST INDIAN
MEAN
(N=22) | 't' VALUE | SIG.
LEVEL | DIRECTION |
|------------------------|-------------------------|-------------------------------|-----------|---------------|-------------|
| CLEANING CAPACITY | 4.97 | 5.00 | 0.63 | NS | - |
| WHITENING CAPACITY | 4.15 | 4.23 | 0.83 | NS | - |
| SUDSINESS | 3.13 | 3.09 | -0.63 | NS | - |
| MILDNESS TO CLOTHES | 4.04 | 3.77 | -2.20 | .05 | WHITE |
| MILDNESS TO SKIN | 4.11 | 4.00 | 0.77 | NS | - |
| QUANTITY PER LOAD | 3.26 | 3.45 | 1.93 | NS | - |
| PRODUCT PRICE | 3.29 | 4.18 | 4.27 | .001 | WEST INDIAN |
| BRAND NAME | 2.96 | 2.27 | -3.21 | .01 | WHITE |
| RECOMMENDATION | | | | | |
| BY FRIENDS | 2.65 | 2.45 | -0.39 | NS | - |
| PACK SIZE | 3.17 | 3.32 | 1.32 | NS | - |
| DETERGENT FRAGRANCE | 3.04 | 2.54 | -4.32 | .001 | WHITE |

* A VALUE OF '1' = 'V UNIMPORTANT', '5' = 'V IMPORTANT'

7. The white group rated 'mildness to clothes', as significantly higher, at 4.04, than the Asian ethnic rating of 3.61 ($p < .001$).

8. Differences between Asian ethnic and white groups were not found to be significant for ratings on 'mildness to skin' (3.95:4.11), 'pack-size' (3.28:3.17), or 'quantity per load' (3.38:3.26).

9. The West Indian ethnic group rated 'product price' at 4.18. This was significantly higher ($p < .001$), than the rating of 3.29 by the white group.

10. The West Indian ethnic rating for 'mildness to clothes'

- was 3.77. This was significantly lower than the white rating of 4.04, with $p < .05$.
11. The West Indian ethnic rating for 'detergent fragrance' was 2.54. This was significantly lower ($p < .001$), than the white consumer rating of 3.04.
 12. The West Indian ethnic group rated 'brand name' at 2.27, significantly lower ($p < .01$), than the white rating of 2.96.
 13. Mean ratings for the West Indian ethnic and white groups did not differ significantly on the attributes of 'cleaning capacity' (5.00:4.97), 'whitening capacity' (4.23:4.15), 'detergent sudsiness' (3.09:3.13), 'mildness to skin' (4.00:4.11), 'quantity per load' (3.45:3.26), 'pack size' (3.32:3.17), or 'recommendation by friends' (2.45:2.65).

DISTRIBUTION OUTLETS FOR DETERGENT PURCHASING

Information on the distribution outlets frequented for laundry detergent purchasing, indicated that small ethnic independents were used to a significantly greater extent ($p < .001$), by the Asian ethnic group (58 per cent), in comparison to a mere 2 per cent of the white group. Supermarkets were also more popular, relatively, ($p < .10$), among Asian ethnic buyers (27 per cent), in comparison to white buyers (17 per cent). Detergent purchases in the white consumer market appeared to be predominantly (81 per cent),

via discount chain stores ($p < .001$).

Evidence of a similar nature also prevailed for the West Indian ethnic group with regard to ethnic independent outlets (14 per cent as compared to 2 per cent white buyers, $X^2=7.96$, $p < .01$), though not in the case of supermarket usage. The difference between West Indian ethnic (63 per cent), and white (81 per cent), consumers in the use of discount chains for detergent purchase, was also slight ($X^2=3.23$, $p < .10$).

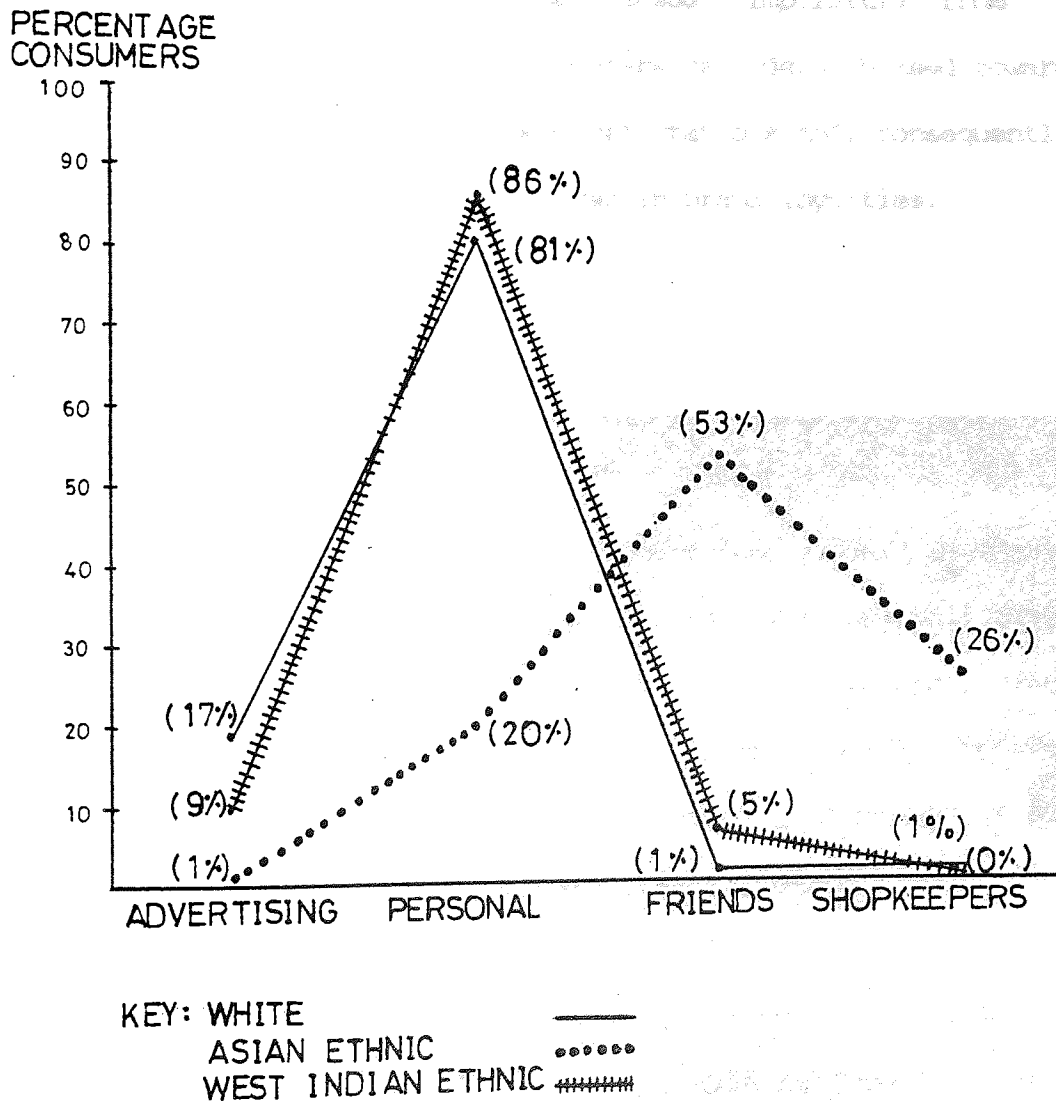
SOURCES OF INFORMATION FOR DETERGENT PURCHASING

The non-market 'friend' source predominated in the Asian ethnic group (53 per cent), rather than the white group (1 per cent), as a source of information ($X^2=70.16$, $p < .001$), claimed for detergent brand choice. 'Retailer' influence, as a commercial market source, also predominated in the Asian ethnic group (26 per cent), compared to white consumers (1 per cent), with $X^2=26.24$, $p < .001$. White buyers were significant on 'personally more reliant experience' (81 per cent), with $X^2=93.2$, $p < .001$, and 'advertising' (17 per cent), with $X^2=20.9$, $p < .001$, as sources of information influencing brand purchase.

In contrast, the West Indian ethnic group was not found to differ significantly from white buyers, on the sources of information claimed to be relied on most. The findings are depicted graphically in Figure 5:2 overleaf:-

FIGURE 5:2

SOURCES OF INFORMATION FOR ETHNIC DETERGENT PURCHASING



SOURCE: Adapted from 'Patterns of Information Acquisition in New Product Purchases', Berning, C.K. and Jacoby, J., Journal of Consumer Research, 1974, Vol.1, (Sept.), p.21

The various product purchasing characteristics discussed above, give evidence that information processing on related product dimensions differs between Asian ethnic and white consumers, and also, though to a lesser extent, for West Indian ethnic and white consumers.

It follows that brand preferences existing for the Asian and West Indian ethnic groups ensue implicitly from an establishment of attribute preference orders biased towards cultural and reference group orientations and, consequently, encourage persistent differences in brand loyalties.

PART 2 ~~~~~

INFERENCES FROM ETHNIC DETERGENT PURCHASING ~~~~~

The previous section was based on a comparison of purchasing characteristics for the ethnic and white consumer groups, with regard to the laundry detergent product-market. A detailed inferential evaluation is reported here, as generated from the evidence in the fore-going section.

SECTION 5:3 ~~~~~

ETHNIC MARKET CONTROL ~~~~~

At a comparative level, it was found that product purchasing was dictated to a significantly greater extent by male buyers in the Asian ethnic, in contrast to the white segment. There were no significant differences observed between the West Indian ethnic and white groups, with the majority in both instances comprising female purchasing agents.

Inferences that follow directly from these findings, include the fact that differences in market control possibly result from cultural factors that cause male buyers to predominate within the Asian ethnic segment, which, in this study, was a predominantly Muslim-Asian consumer group (Section 4:3).

In this context, it must be remembered that low economic activity rates have been reported for women within the Muslim-Asian ethnic groups, originating from the Indian sub-continent (Smith, 1978; Barber, 1981). Such differences in economic activity levels have, moreover, been attributed by Barber, 1981, to ostensibly 'cultural' factors (p.7), making this group different in orientation from the West Indian ethnic and white consumer groups. Additionally, it was found, (Smith, 1978), that low economic activity rates among Asian women are directly related to evident linguistic barriers, and ensuing communication difficulties.

The results reported here, are thus in line with previously existing evidence, in suggesting that differences in product market control result due to a combination of factors including low economic activity rates, as well as different linguistic orientations of women within the Asian ethnic groups.

SECTION 5:4

ETHNIC PURCHASING LEVELS

A comparison of detergent purchasing characteristics by levels of consumers in the different age and socioeconomic categories, indicated that a high 78 per cent of Asian ethnic detergent buyers were in the 25-44 yrs age group, in contrast to 42 per cent white, and 46 per cent for the West Indian

ethnic group. Ethnic and white differences were similarly reflected in the purchasing levels accounted for by consumer distributions in the social class groupings. Consistent with the data in Section 4:3, as well as with census figures (Lomas, 1971; Barbar, 1981), relatively greater proportions of Asian and West Indian ethnic buyers were found in the 'DE'/'F', blue collar occupational categories, in comparison to white buyers. It can be inferred that the 'DE'/'F' ethnic group classes, together constitute the largest fraction of ethnic buying power in terms of consuming units, in contrast to the white consumer population which has a more evenly spaced demographic distribution.

In order to reach the majority of ethnic buyers, marketers accordingly have to target a primarily 'low income segment', and could, furthermore, expect higher price sensitivity levels as they are affected by ethnic income structures in comparison to the white consumer market. This latter aspect would not, however, be of inordinate significance for a low-priced product category such as the detergents sector.

SECTION 5:5

ETHNIC PURCHASE FREQUENCIES & PACK-SIZE PENETRATION

The evidence on ethnic purchase frequencies indicated that there was a significantly higher proportion of Asian ethnic consumers (13 per cent), purchasing at frequencies of 'once

in 3-6 months', in comparison to 2 per cent for white buyers. A similarly higher proportion, 39 per cent, in the Asian ethnic group were also estimated as purchasing the larger pack size, in comparison to 6 per cent for white buyers. Lastly, the Asian ethnic group had a higher average purchase rate of 3.17 packs per month, compared to 2.73 packs per month in the white buyer segment.

A significantly greater proportion of West Indian ethnic buyers (23 per cent), purchased the larger, E-10 detergent packs compared to the estimated 6 per cent recorded for the white group. At a comparable level differences were also observed for purchase frequencies, in terms of the proportions purchasing at 3-6 months intervals (9:2%), for West Indian ethnic and white buyers. This was counterbalanced by a lower average purchase rate of 2.13 packs per month, compared to the white purchase rate of 2.73, as stated above. These estimates for greater penetration of the E-10 pack in the Asian and West Indian ethnic groups are significant, in view of the fact that EIU (Economist Intelligence Unit), estimates for pack sizes by retail value, are reported to be of the order: E10=15%, E3=65% and E2=most of the remainder (MGN Marketing Manual for the UK, 1979), implying a markedly lower purchasing level of 15% for the E-10 pack-size, in the general market.

In this context, it should be noted that detergents are one of the first product groups to fall in line completely

with other EEC countries, with regard to packaging specifications. In the early part of 1975, all packs were standardised into the new 'E' pack range. Existing packs are accordingly based on multiples of 3/4 of a litre, the E1 pack being 3/4 litre, the E2, one and a half litres, etc., to the E10 size. Since the packs are based on volume rather than weight, they cannot necessarily be compared by consumers for relative prices, although seemingly uniform in appearance. This is more so since soap powders tend to be denser than synthetic detergents, so that an E1 'soap' powder pack will contain a greater weight than a 'synthetic' powder pack, though the same in volume terms. In view of this ambiguity, ethnic and white differences in pack-size purchase, would tend to reflect price, rather than weight biases. Even so, these findings highlight two major inferences, that bear on detergent consumption:-

1. DISPROPORTIONATE VOLUME CONSUMPTION

Disproportionately larger amounts of the product were consumed by the Asian ethnic, and also, to a lesser extent by the West Indian ethnic group in comparison to white buyers, as evidenced in higher, average ethnic purchase rates and pack-size consumption.

2. DISPROPORTIONATE PENETRATION OF THE LARGER PACK-SIZES

Significantly greater proportions of consumers in the

Asian and West Indian ethnic segments purchased the larger, E10, pack size in comparison to white consumers.

Similar consumption trends are reported in related research on the black and Hispanic ethnic market segments in the US (Bullock, 1961; Bauer and Cunningham, 1970; Sexton, 1972; Forkan, 1979). Disproportionate consumption has been noted, particularly, for certain food and grocery product categories. The Latin market was thus estimated as spending 10% more on food, because it averages larger families (Sinha, 1977; Forkan, 1979). Market research data by Nielsen, on the American black market, (Sinha, 1977; Anderson, 1979), reports that black consumers spend more on many grocery staples, including evaporated milk, salad, and cooking oil, and also on a number of other basic ingredients such as all-purpose flour, cornmeal, spaghetti and macaroni. Black and Spanish customers also buy more of fresh vegetables, poultry and produce, when compared to whites within the same per capita income ranges, again because of the existence of larger households. The present findings thus corroborate previous evidence, in indicating that disproportionate consumption trends within the UK Asian and West Indian ethnic groups at least in the laundry detergent product category, are due to a combination of societal and demographic factors, related directly to larger ethnic household sizes.

Disproportionate penetration levels for the larger product pack sizes with regard to the ethnic segments, are

substantiated by research on black shopping patterns in the US. Statistics from Target Group Index (Dietrich, 1975), showed that less blacks shopped for groceries on a weekly basis, compared to whites. Longer purchase intervals were also accompanied by larger purchase expenditures, despite lower black median incomes, when compared to whites. Since grocery shopping in the black Negro segment and, also in the white market is conducted primarily by women, the differences in purchasing patterns between black and white segments can be explained on the basis of the higher proportion of economically active Negro women, with longer working hours and less shopping time (Dietrich, 1975), in comparison to women in the white consumer market.

Trends in the penetration of the larger pack sizes for the Asian ethnic, in comparison to white consumers can be explained along similar lines, on tendencies to longer purchase intervals, in a segment where the greater proportion of purchasers constituted male buyers.

Yet another reason advanced for the penetration of the larger pack sizes among ethnic and black buyers, is their need for economy due to lower per capita incomes (Sexton, 1972; Dietrich, 1975; Forkan, 1979). An important consideration still remains, however, in that the large majority of buyers within the ethnic groups still purchase the smaller, E-3, pack sizes. This tendency is consistent with inner city marketing policies where it is recognised that since the

larger packs require bigger cash outlays, economy sizes are not economical in ghetto areas where the majority of consumers happen to be low-income shoppers (Advertising Age, 1972; Sales Management, 1973).

The results imply moreover, that due to commonalities in ethnic demographic structures, the Asian and West Indian markets in the UK, are very similar in purchasing patterns to the US black and Hispanic groups for certain product categories, in which they constitute 'heavy user' segments. The marketing implications ensuing from consumption patterns of ethnic groups, are summed up by Green, 1979:-

"In order to maximise product sales and internal growth, it would behoove companies to assess their marketing efforts as geared toward the black consumer. Considering that most product categories are shared by three or more major manufacturers plus a private label, a sizeable share of the black consumer market does mean the difference in an individual manufacturer's over-all market share position." (p.34)

Paradoxically, research evidence in this context indicates that, purchase frequencies also affect brand loyalty formation, so that small time intervals between purchasing, constitute an important factor in the brand repetition learning process (Kuehn, 1962; Draper and Nolin, 1971; Peckham, 1963). Long purchase frequencies are therefore deduced (Kuehn, 1963), as hindering the brand loyalty process. While the research evidence presented here confirms the fact that a greater proportion of weekly purchases in the

Asian and West Indian ethnic groups was accompanied by higher brand loyalty levels among ethnic consumers, long purchase frequencies do not appear to have negatively affected brand loyalties, as evidenced in the significantly higher proportion of large pack-size, brand loyal consumers, noted for the Asian ethnic group.

SECTION 5:6 ~~~~~

ETHNIC BRAND LOYALTIES, BRAND DUPLICATION & BRAND SWITCHING ~~~~~

Evidence on the penetration of brands, regardless of consumer brand loyalty levels, within the ethnic segments indicated that:-

The Asian and West Indian ethnic groups differed from the white group in the penetration levels for different brands. The white consumer market evinced disproportionate penetration levels for 'Ariel' (P & G) and 'Persil' (Lever), in comparison to other brands. This was consistent with UK market shares reported for these brands (Market Research Great Britain, 1980), and also with consumer research commissioned by Mintel, 1977, on 'brands purchased the previous month', according to which 'Persil' (Lever), was found to have market shares ranging from 25% for 'Persil Automatic', and 23% for 'Persil', in comparison to 14% for Daz (P & G). In fact, the most interesting point to emerge in the Mintel study, was the rise of 'Persil Automatic', and the

decline of P & G's 'Daz' between 1974 and 1976.

Within the Asian ethnic segment however, there were disproportionate penetrations for 'Daz' (P & G) and 'Fairy Snow' (P & G). The West Indian ethnic segment offered yet another contrast in the significant penetration levels for P & G's 'Daz' and Lever's 'Surf', despite essential loyalty within this group, for Lever's 'Persil'.

In this connection, Mintel research on the UK market for brand penetration by age group, has shown that '...Persil users lean towards the 45-64 yrs age group; Persil automatic, towards the 25-44 yrs age group; Ariel towards older buyers; Surf towards younger buyers'. An analysis by social grade also reveals the distinct up-market bias of 'Persil automatic', with 47% 'AB' consumers. In contrast, 'Persil' (ordinary), was found to have a consumer distribution in favour of the 'D/E' social classes, with 19% in the D grade, and 26% E, while the distribution observed similarly for Daz was 19% D, and 18% E (MGN Marketing Manual, 1979; Mintel, 1980). The figures are consistent with the high brand usage of Persil (ordinary), observed for white consumers in the present study, and also emphasise the contrast for the Asian and the West Indian ethnic groups which constitute a market, inclined towards younger buyers.

In contradistinction to brand penetration levels, the estimates for 'single brand loyalty' indicated that the

difference was not significant, for the levels of brand loyal consumers, between the Asian ethnic (81 per cent), and white (82 per cent), markets. Surprisingly however, the Asian ethnic segment had a disproportionate number of 'hard core' buyers for P & G's 'Daz', despite the brand's lower UK market share, and also lower levels of advertising, remarked on in Section 5:1, in comparison to Lever's 'Persil'.
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At a comparable level, the West Indian ethnic segment exhibited distinctly lower levels of 'single brand loyalty' (38 per cent), and also concomitantly high levels of brand switching, in comparison to the UK white market.

On the basis of these related aspects, the following inferences can be drawn for the ethnic consumer segments:-

Disproportionate preferences for the same brand among Asian ethnic consumers compared to the white market, imply a high level of 'group commitment' to a single brand. It could be inferred that brand loyalty among Asian ethnic consumers, makes for, and is related to, 'group', rather than 'individual' preferences, ranging over a number of brands.

Evidence of the 'group' loyalty element, in the Asian ethnic segment is found in a number of diverse contexts related to ethnic community organisation emphasising strong kinship networks, delineated by linguistic and religious boundaries (Anwar, 1979).  
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Similar evidence for strong brand loyalties is also observed for the Hispanic, Spanish-speaking American ethnic segment (Diaz-Albertini, 1979); where language is described as the common bond sustaining this group. In accounting for this situation, Sinha, 1977 describes the consumer loyalty to brands as below:-

"The Latin is highly brand loyal. The Spanish speaking consumer tends to buy well known or familiar brands because of the trust in brand names... Brand loyalty thus remains strong among Spanish-speaking people, largely because of the language barrier." (p.32)

At a practical level, the findings imply that the 'brand preference' element within the Asian ethnic segment, is of itself only one aspect, and not the most important one, dictating brand loyalty. The underlying dynamic appears to be the 'cultural brand loyalty' factor, which involves among Asian ethnic groups, greater ego-involvement and higher levels of personal commitment to the group as a whole.

This dimension of 'intragroup' brand loyalty appears to operate as the 'market power', leading to preferential ethnic loyalties to particular brands based on a combination of the 'cognitive, affective, evaluative and predispositional factors, which result in repeat buying behaviour....' (Jacoby, 1971).

The commitment thesis, and its impact on brand loyalty is

accordingly described by Tarpey, 1974, as follows:-

"The notion of commitment provides an essential basis for distinguishing between brand loyal behaviour and repeat purchase behaviour. While brand loyalty has been operationalised as repeat purchase behaviour, its conceptualised formulation as a psychological process, places it in the category of a non-observable phenomenon." (p.216)

Repeat purchase behaviour in the context of the Asian ethnic groups implies, merely, that both, the language barrier and ease of availability of brands through promotional and retail shelf displays, are the main reasons dictating choices for particular brands. Group commitment suggests that, in addition to mere repeat purchasing, the process has a psychological rationale based on reference group influence and opinion leadership, due to the interpersonal communication networks noted to exist in the case of several ethnic groups (Light, 1972; Anwar, 1979). Individual ethnic consumers can thus be considered less prone to switch, despite competitive conditions and fluctuations in brand pricing, or advertising. The 'group loyalty' phenomenon consequently serves as a successful measure in building up 'brand' loyalties, because of the added advantage conferred in building up resistance against brand switching, regardless of changes in market conditions.

'Single brand loyalty' levels in the West Indian ethnic segment (38 per cent), contrasted distinctly with those for the Asian ethnic group, but followed a trend similar to that

observed for white consumers. Thus, West Indian ethnic brand loyalties to 'Persil' (14%), 'Daz' (9%) and 'Surf' (5%), were consistent with the UK market shares for these brands, but were lower for 'Ariel' (5%), in comparison to its UK market share of 11%. Low loyalty levels apparently persisted, despite high penetrations for all brands noted for this segment. These results point to consumer loyalties for the West Indian ethnic group, based evidently on the 'leading brand' phenomenon, with Lever's 'Persil', the only brand that can claim any degree of loyalty in this segment. Brand loyalty in such instances, would appear to be the result of heavy advertising and promotional policies targeting the general white market.

Consumer research on the black ethnic segment in the US, gives substantial evidence for circumstances leading to the formation of similar brand loyalties. Two broad views are subscribed to, for the brand selection process among black consumers. The first is that blacks buy '....on a price basis due to lower incomes.. ' (Sexton, 1972; Feldman and Star, 1968; King and DeManche, 1969). The alternative, and more recent viewpoint is that blacks buy 'brands denoting status and prestige.. '. According to Evans, 1968, blacks were described as desiring 'the same brands, the same labels, as they imagine the best white Americans have.... '. Johnson, 1976 expressed a similar view:-

"The black consumer often feels left out...Often the association of a name product provides a lift."

Research in this area substantiates the fact that, though price does appear to be an important factor in the case of low income black consumers, both price and status signify as important in their appeal to high income blacks. Relatedly, Feldman and Star, 1968 found that blacks at all income levels
~~~~~  
considered price an 'important purchase consideration'. However, 'living better' or status considerations, increased in importance with income increases. Based on a panel study by Progressive Grocer, 1975, the black consumer has been  
~~~~~  
described as 'particularly quality conscious' so that 'in leaning heavily towards nationally advertised brands rather than house labels or secondary labels, the consumer is purchasing a status symbol'. Similar data were recorded in the overly high consumption of scotch and its association as a 'status' drink, thus denoting a form of 'self-perceived mobility' (p.3), in its purchase by black consumer groups (Bauer, Cunningham and Wortzel, 1965).
~~~~~

This existing body of research, thus gives ample evidence that the black American market consists of 'two major segments with income the primary determinant in distinguishing these segments'. Advertised brands, recognised as well-known 'white' products, imply quality and equality for black consumers (Bauer and Cunningham, 1970).  
~~~~~  
Consequently, the 'basic dilemma', (Bauer, Cunningham and Wortzel, 1965), described as resulting for blacks, is
~~~~~  
'whether to strive for goods of high symbolic value or not...' (p.21), with the higher income 'strivers' much more

brand conscious than white consumers, and with '...established brand preferences.' Johnson, 1976 accounts for the above average loyalty by blacks, to national brands:-

"The black consumer gets burned on switching from national brands, and therefore prefers to go top shelf, not second best. Blacks have come to know that with branded merchandise, they get their money's worth, no short changing on quality."

The present findings highlight the fact that, West Indian ethnic consumers are similar to the black American Negro market in their characteristic brand orientations, particularly for quality brands such as 'Persil', which, as shown in Table 5:4, is supported by heavy advertising appropriations.

The data also indicated, however, that substantial amounts of brand switching behaviour were present for lower-income consumers within the West Indian ethnic group, in contrast to either white consumers or the Asian ethnic group. Supporting evidence in this context, is obtained with regard to the black American market (Feldman and Star, 1968). Distinctly lower levels of brand loyalty have been explained as ensuing from high product prices, so that chances to acquire goods of symbolic and prestige value are much lower for low-income blacks, who cannot afford to pay high prices. Nevertheless, erosion of brand loyalties appears as a phenomenon affecting the more sophisticated, higher income blacks as well (Dietrich, 1975). This trend is described by Sinha, 1977 as



follows:-

"The black consumer is brand loyal like the Hispanic consumer, but presents a greater opportunity for marketers because of the transition stage in moving towards greater experimentation. In the past, blacks built up brand loyalty because they had fewer choices in their local outlets. This is no longer true as social and economic mobility increases." (p.30)

Such inherent brand switching propensities among black shoppers are further elaborated on, by Sinha, 1977, who describes blacks as:-

"...being open to trying out new products if they are presented in a way that makes sense to them. The new product must be believable as something that will help them live better, save time, or gain more status..." (p.31)

Changing brand loyalties have also been reported by Evans, 1976:-

"Among blacks there has been strong evidence of a market revolution in brand disloyalty. This increasing disloyalty may lead to improved chances of success for black business, if black consumers increasingly patronize such enterprises..."

Eroding brand loyalties are thus an indirect asset to marketers and find their justification (Sexton, 1972), in the need for black consumers to be more discerning about prices, and product purchasing, so that they no longer stick to 'name' brands. The phenomenon emphasises the need, rather, for marketers to increase their efforts in reaching low-

income blacks, representing, as they do, a market 'large enough to be potentially profitable to those marketers who can offer both economy and reasonable quality to the segment.' (p.39).

In perspective, these elements of brand switching, and brand penetration, coupled with a response to the status appeal of leading brands, can be expected to continue to characterize black consumers. In fact, with the emergence of a growing middle class which controls 70% of the consumer spending for this group (Gibson, 1979), value changes will inevitably cause changes in brand preferences as blacks become '...more venturesome and independent and less interested in impressing whites, but more interested in expressing themselves among their peers' (Parke-Gibson, 1979, p.24).

Emergent differences in brand loyalty preferences between Asian, West Indian ethnic and white consumers, draw additional explanation from the 'assimilation-contrast' hypothesis (Sherif, 1961; 1965; Jacoby, 1971; Tarpey, 1975). According to this theorising, a framework is generated in which consumers are organised into 'regions of consumer acceptance, rejection and neutrality'. Buyers therefore 'select in' certain brands (leading to brand loyalty), and 'select out' certain other brands (causing brand switching).

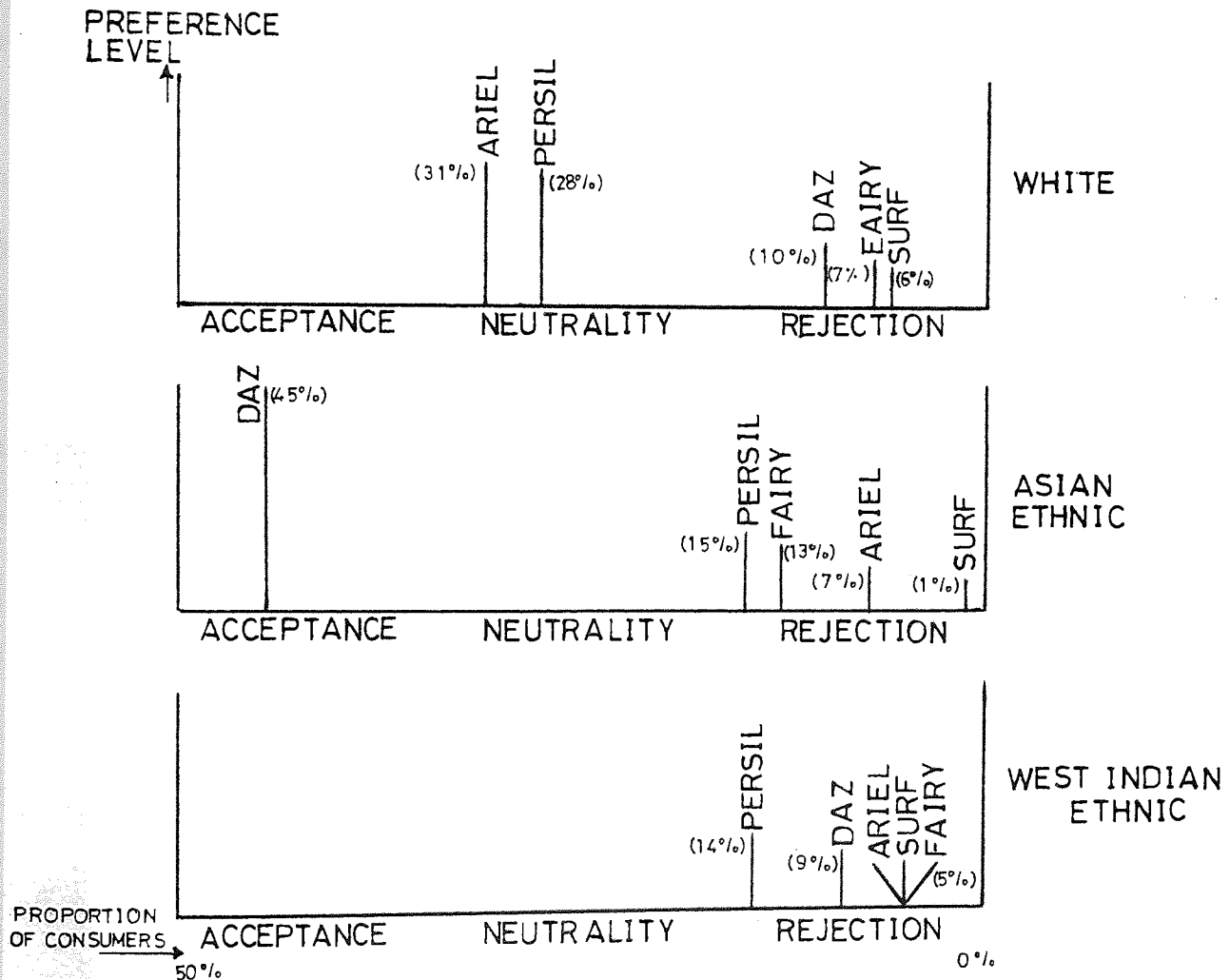
Consequently, 'assimilation' leads to preferential consumer loyalties to brands falling within the latitude of

acceptance, and is thus equivalent to Howard and Sheth's, 1969, concept of the 'evoked set'. The 'contrast' element leads to the tendency for certain brands to be perceived in the region of 'rejection' due to inacceptability with regard to product-brand characteristics. The latter are therefore subject to high consumer resistance to change. Between the 'acceptance' and 'rejection' regions is the latitude of 'neutrality' which includes brands, 'neither acceptable nor objectionable and to which the buyer is noncommittal'. By using this principle, the Asian and West Indian ethnic groups were assessed on the extent of penetration of existing brands. Different preference patterns were found to emerge, as indicated in Figure 5:3, with the 'acceptance' region including the most favored brand, as well as others that are acceptable.

In its explanation of brand preference patterns, the 'assimilation-contrast' hypothesis is described as drawing on psychological as opposed to objective reality, (Tarpey, 1975). It is therefore theorised as being consistent with the brand loyalty process (Jacoby, 1971), as comprising six causative elements, which make it, 1) a biased non-random, 2) behavioural purchase, 3) expressed over time, 4) by a decision-making entity, 5) based on considering one or more alternatives, 6) and essentially psychological. Consequently, it can be considered that the 'acceptance' and 'rejection' regions display personal phenomenological fields, as presented by aggregate cultural predispositional factors.

FIGURE 5:3

BRAND PREFERENCE PATTERNS  
IN THE ASIAN & WEST INDIAN ETHNIC GROUPS



- \* GREATER THAN 15% CONSUMER PROPORTION IMPLIES LATITUDE OF ACCEPTANCE
- \* BETWEEN 5%-15% CONSUMER PROPORTION IMPLIES LATITUDE OF NEUTRALITY
- \* BELOW 5% CONSUMER PROPORTION IMPLIES LATITUDE OF REJECTION

SOURCE: Adapted from 'A Model of Multi-brand Loyalty', Jacoby, J., Journal of Advertising Research, Vol.11, No.3, (June), p.27

The differences in the Asian ethnic and white brand preference patterns accordingly draw explanation as follows: given that brand loyalty represents behavioural predispositions among cultural segments, the Asian, West Indian and white consumers represent groups for which the 'assimilation' and 'contrast' regions are different in the threshold values, above and below which brand loyalty exists.

The greater the differences in intensity of predisposition between Asian and West Indian ethnic and white cultures, the greater would be the distance between the regions of brand 'acceptance', 'rejection' and 'neutrality'. According to the penetration levels observed in Figure 5:3, white consumers had 'Ariel' (P & G), and 'Persil' (Lever), near the 'acceptance' region, as the most favorable brands in the evoked set. The Asian ethnic group differed, in its more dominant preference for P & G's 'Daz', in the 'acceptance' region, as well as 'Fairy Snow', another P & G brand, as the third, most preferred brand. In contrast the West Indian ethnic segment showed several brands, namely 'Ariel' (P & G), 'Daz' (P & G), and 'Persil' (Lever), all in the 'evoked set', indicating higher tendencies to brand switch within this segment.

It can be deduced in the present context, that, the differential assimilation of brands by Asian and West Indian ethnic and white consumers into latitudes of 'acceptance', 'rejection' and 'neutrality', owes itself to differences in

societal and cultural influences operating for these segments. Significantly, the elements of increasing brand commitment, ego-involvement, and the perceived importance of particular brands due to reference group influence, can be considered as increasing contrasting tendencies in brand preferences, leading, 'ceteris paribus', to increases in the brand loyalty behaviour observed for the Asian ethnic group.

If the psychological dimension of brand loyalty is indeed culturally oriented, it could be considered to lead to more 'group' than 'individual' brand commitment for the Asian ethnic segment, and more 'individual', but less 'group' oriented brand loyalties for white and West Indian consumers. Such brand preference variations thus give evidence, then, of existing as cultural artifacts, rather than determined on any 'a priori' principles.

An important consideration ensuing from the above, was, that the clustering of brands in the 'acceptance' region gave indications of the competitive character of existing brand names. Thus, competitive activity gauged from Figure 5:3, indicated that for the white segment, Lever's 'Persil' was the leading brand, with P & G's 'Ariel' its major UK competitor. Within the Asian ethnic segment, Procter and Gamble's 'Fairy Snow' was estimated as third to the leading brand, 'Daz'. The West Indian ethnic group showed a more diffuse preference structure, with a number of competing brands against Lever's 'Persil', as the brand with the

highest proportion of 'sole buyers'. Such categorisations assume all the more importance, given that the greater the single brand loyalty or 'detentivity' (Kuehn, 1963) for given brands in each cultural segment, the less the brand switching pressure that would erode existing loyalties (Kuehn, 1963; Mills, 1971; Longton and Warner, 1971; Baum and Denis, 1971).

Ultimately, however, the evidence on brand shifting preferences confirms previous research by Kuehn, 1962, that the most recent purchase is not the only one influencing brand choice. The probability of repurchase of a brand is hypothesised as decreasing at a constant rate called the 'time rate of decay purchase probability', so that the probability of purchasing a given brand is only related to favorable attitudes towards the brand.

Under these circumstances, brand shifting itself appears to be central to the dynamics of the ethnic market place with its connection to factors concerning product price, advertising, distribution, shelf-space, and the importance of product characteristics. In fact, the brand switching factor within the Asian and West Indian ethnic groups, can be considered to serve as a 'merchandising attraction', so that only transition properties, in the product/brand attributes that influence consumer loyalties at any point in time, could be considered as eventually responsible for causing ethnic segmentation patterns to exist.



## SECTION 5:7 ~~~~~

### ETHNIC INFORMATION PROCESSING OF PRODUCT ATTRIBUTES ~~~~~

Consumer profiles obtained from the mean ratings on 'product attribute importance' for the Asian and West Indian ethnic and white groups, gave the following observable differences:-

1. Asian ethnic consumers rated the product dimensions of 'whitening capacity', 'detergent sudsiness', 'product price', 'recommendation' by friends' and 'detergent fragrance' as significantly more important, and 'cleaning capacity', 'mildness to clothes' as well as 'brand name' as significantly less important, in comparison to white consumers.
2. West Indian ethnic consumers rated 'product price' as significantly more important than the white group, and 'mildness to clothes', 'brand name' and 'detergent fragrance', as significantly less.
3. Differences were not significant for Asian or West Indian ethnic and white groups on 'mildness to skin', 'quantity per load', or 'pack-size'.

Since task involvement in detergent information processing is known to be relatively low (Henry, 1975), it can be inferred from such findings, that differences in mean ratings on product attribute importance for ethnic and white groups, are strongly indicative of the cultural biases that cause

different primacy effects to prevail..

Differences in the importance of product attributes have been similarly observed, for other ethnic groups and product classes. Thus, the US Hispanic ethnic segment was evidenced as emphasising the product attributes of Mazola corn oil, so that more subjective 'taste' elements, rather than the cholesterol free 'dietary' aspects are more important (Diaz-Albertini, 1979). Similarly, the black American market is described (Sinha, 1977; Maggard, 1971), as exhibiting a high propensity for 'quality' attributes, in order to reinforce the 'prestige' denoting, 'status' aspects which are symbolic of such products. The 'price' attribute has, in addition, been found to figure significantly (Bauer and Cunningham, 1970), in the brand choices of blacks within the lower income categories. Findings from the current survey, thus tend to confirm existing evidence that the processing of information on product attributes, differs due to culture and class variations among groups.

Relatedly, consumer research on the information processing of product attributes (Bettman, 1970; Wright, 1972; Speller and Kohn, 1974; Russo, 1975; 1977; Park, 1977; Howard, 1978), indicates that cognitive differences existing within the conceptual framework of different groups, have the effect of altering the information processing mechanism, thereby resulting in variations in the processing of product attributes. This was supported by research conducted by

behavioural scientists, Dunekar, 1945; Asch, 1952; Driver and Strenfert, 1969; Gleitman and Gleitman, 1974; Garner, 1977), also indicating that the processing of product attributes is related, especially to consumer flexibility. Notably, however, such evidence applies only to the general consumer market structure rather than to specific submarkets. The present findings advance the additional hypothesis that, information processing differs across ethnic groups such as the Asian and West Indian, due to their ostensible existence as cultural consumers. The important variations are discussed in detail below:-

#### 1. IMPORTANCE OF BRAND NAME

'Brand name' was rated as significantly more important by the white, rather than Asian or West Indian consumers. The evidence implies that 'brand consciousness', and associated reliance on brand names takes precedence in shaping white consumer loyalties, but is not as yet the overriding factor in the case of either Asian or West Indian ethnic groups.

The findings were consistent with the generally low levels of brand loyalty for the West Indian ethnic group, and the high proportion in this group claiming to have switched brands since the preceding purchase, as discussed in Section 5:6. Previous research also gives evidence of a similar nature for the black American

market, in indicating that 'brand name', rather than 'price', only assumes symbolic importance when associated with increasing incomes. In this connection, King and Demanche, 1969 report that low income black consumers indicated a greater recall for private brands, than either low income or middle class white consumers. In fact, it was found that there are whole product categories such as facial tissues, which appear not to have the high symbolic values for Negroes, as for middle-class whites in general.

Brand choice statistics for Negro buyers, were, even so, found to give more or less stable brand preference patterns, depending on the product category (Bullock, 1961; Bauer, 1964). In an analysis of the subtle motivational differences that exist between brand choices for black and white consumers, it was indicated by Bullock, 1961, that 'prestige' brand buying for Negroes, is often given preference to the need for economy, so that brand consciousness itself is a defensive measure which serves as a selective factor, in the allocation of resources. In contrast, brand names for white consumers serve to enhance the ego.

However, black and white differences in 'brand name' importance are explained as essentially the result of income differentials. With the levelling off of income differences, high income blacks were also discovered to

lean heavily towards well-known and nationally advertised brands (Forkan, 1979), rather than go for 'house', or 'secondary' labels. The image of blacks as 'quality' buyers has, therefore, largely displaced the earlier black stereotype which considered them as 'incompetent to judge the quality of goods' (Bauer and Cunningham, 1970). Brand names in the Negro market are, in fact, heavily relied on for reassurance, and as symbols associated with status and self-perceived mobility (Fisk, 1962).

In fact, a comparative analysis of brand preferences among middle-class Japanese Americans and Negro groups (Dalrymple, 1972), gave evidence of significantly lower ratings attributed to brand name importance by Japanese ethnic, as compared to black consumers, showing its relatively greater symbolic importance in this latter group.

From the existing evidence and the present findings, it can be concluded that though brand names appear to be differentiated, primarily on the basis of status and ego considerations, preference variations still exist, between Asian and West Indian ethnic and white groups, due to significant motivational differences.

The importance of brand names cannot, therefore, be underestimated, despite the existence of the brand switching factor. This was given appropriate emphasis in Mintel's,

1980 comment on brand name importance, according to which  
'...the leading, single brand for the last thirty years has  
been either Persil, or latterly, Persil Automatic. The two  
products are very different in formulation, the former still  
being a soap powder, and the latter a low suds synthetic...'.  
But the continued importance of a brand name has been a  
triumph of marketing and a demonstration of '..how elastic a  
product life cycle can be....' In fact, as Mintel remarked  
when covering the subject in February 1980, '..one of the  
mysteries of the British market, particularly to Americans,  
is the survival of soap powders, particularly 'Persil', when  
the rest of the world has long gone over to synthetics...  
Another source of mystery - and amusement - to Americans is  
the existence of a leading brand with the outrageous (to  
them), name of 'Fairy Snow'. The mystique of marketing  
'brand names' is obviously nowhere stronger than in the  
detergent market.. . And the ethnic groups apparently  
contribute their share to the seeming ambivalence.

## 2. IMPORTANCE OF PRODUCT PRICE

The Asian and West Indian ethnic groups were found to  
rate the 'price' attribute as significantly more  
important than white consumers. The concern with price  
as an important product attribute in the black market is  
substantiated in a number of continuing research studies.  
While an an important consideration in the case of low

income blacks (Sexton, 1972); both 'price' and 'status',  
have been found to be equally important for high-income  
blacks (King and Demanche, 1969). Among white consumers  
on the other hand, Feldman and Star, 1968 indicate that  
price decreases in importance rather than maintain the  
same priority, as consumer incomes increase.

The existing evidence points, also, to the fact that  
'price' as a product attribute, does provide significant  
cues that facilitate the brand discrimination process.  
To the extent that ethnic consumers comprise a  
substantially low income group, they obviously do have  
lower differential price thresholds, i.e., the price  
above which they will not buy, and are more sensitive to  
price changes. However, since the limits of acceptable  
price ranges as perceived by consumers, are largely  
determined by prevailing market prices (Pessemier, 1969),  
the differences in ethnic price sensitivities would have  
little short term effect in dictating ethnic brand  
choices. Empirical evidence for this is obtained in the  
'psycho-physical adaptation level theory' (Granger and  
Gabor, 1970). According to this, there is a region of  
indifference about the standard price so that changes in  
product price around this region, produce no change in  
consumer price perceptions. Since consumer judgements of  
the neutral reference price are drawn from existing  
product prices at any point in time, it could be argued  
that, the perceptual process causing ethnic and white



differences in price sensitivities to result, ensue from associated quality attributes also perceived as important (Pessemier, 1969; Helson, 1966; Emery, 1968; Olander and Granger, 1970).

Envisaged in the long term, the applicability of this rationale implies that, the differential importance of price for Asian and West Indian ethnic or white consumers is bound to reflect differences in brand choice based, not only on the perceived importance of product-quality attributes, (Jacoby, 1971), such as detergent color (Cox, 1977), but also on the importance of the product in the consumer's budget, and the frequency with which it is purchased.

Thus the saliency of price as a purchase criterion can be expected to vary in the Asian and West Indian ethnic groups, even though its overall, recognised importance remains undiminished. This is emphasised in Economist Intelligence Unit (EIU), 'Retail Business' reports, which claim that 'price cutting is the most effective and popular incentive from retailer to consumer...'. Equally, manufacturers make offers available to retailers. This is particularly evident in a field such as washing powders where a static market demands a series of continuous 'point of sale' promotions to retain and stimulate sales (Retail Business, 1971). The attitudes of leading manufacturers to pricing strategies with regard to laundry detergents, lend further credence to the importance of manipulating price in order to promote sales.

As was found in consumer research carried out by the Price Commission, 1978 (~~~~~Mintel, 1980~~~~~), while P & G took a decision to abandon pricing on its detergent and soap packs from January, 1980, Levers stated that they would '...continue to use flash offers and prepricing ...to assist the trade in projecting value, and the consumer in recognising it....'

### 3. IMPORTANCE OF PHYSICAL ATTRIBUTES OF THE PRODUCT

A curious aspect noted in the importance given to physical product attributes, was that, while the Asian ethnic rating was higher for 'whitening capacity', 'sudsiness' and 'product fragrance' (rather than 'freshness'), the mean ratings for the white group were significantly higher for 'cleaning capacity' and 'mildness to clothes'. These results imply that, the importance given to product dimensions denoting the physical characteristics of detergents, varies with the prevailing cultural bias, so that similar product dimensions are attributed differential importance by ethnic and white groups.

Taking these isolated aspects on information processing of product attributes together, the results imply that Asian and West Indian ethnic and white consumers constitute idiosyncratic cultural segments that differ in the importance given to product dimensions. The relative importance of the physical attributes of detergents

within the white consumer market, is noted in EIU 'Retail Business', 1971, reports, remarking on the 'loyalty of women happy with their existing washing powder'. According to the EIU assessments 'Persil' (also with the largest proportion of brand loyal buyers), attracts an '...extremely conscious consumer, dedicated to primarily doing her washing absolutely right, seeking softness with time and trouble a comparatively secondary consideration..'. Daz and Omo users look for a 'whiteness and brightness' promise and are also believed to be 'much more fickle'.

This orientation of the white consumer market is reinforced by the opinion of Lever, that buyers of enzyme powders are either '...perfectionists, seeking complete cleanliness, or those who wish to complete their washing with a minimum of involvement'. Consequently, a major preoccupation with both manufacturers is to increase the 'enzyme powder' market. These reports are confirmed by Mintel research (Mintel, 1980), according to which '....Persil washes whiter' is the basic theme that has been used consistently for promoting the brand to white consumers. Moreover, in almost all 'above-the-line' expenditure which is directed primarily via television promotions, it was noted that '... Persil institutionalises 'whiteness that cares' and 'majors on softness. Arch rival Ariel, promotes a more science fiction, hard sell..., digests dirt and stains that

ordinary powders leave behind.' Radiant, Biological Omo, New Blue Daz, all engage in attempting to overcome the credibility gap with dazzling 'whiteness, brightness' with Tide emphasising 'freshness' (Retail Business, 1971).  
~~~~~

In the present context, such variations in the relative emphasis given by manufacturers in promoting brand attributes, were consistent with the higher brand loyalties evidenced for 'Persil' in the white group (discussed in Section 5:6), and also the higher mean ratings given to the 'mildness to skin', and 'mildness to clothes' product attributes. In contrast Asian ethnic consumers had a higher proportion showing brand loyalties to 'Daz' (P & G), associated with significantly higher ratings for the 'whitening capacity' attribute.

Two reasons can be advanced to explain such differences. First, as the number of product attributes to be considered increases, the information complexity entailed in attribute processing also increases, resulting in different product dimensions being considered important by the consumer. The different semantic profiles obtained by ethnic and white ratings on product attributes (Appendix B:2), thus support the information processing theory that, consumers, in an attempt to limit stress, restrict the number of attributes per brand they will actually consider. This would alter the product information considered important, in comparison to

the information content provided. Consumer research with regard to detergent information processing in particular, indicates that black and white ratings differed significantly in the importance attributed to the environmental and ecological attributes as they affect detergent choice (Murphy, Kangun and Locander, 1978). Moreover, a shift in brand preferences by socially conscious white consumers was also found to occur in favour of environmentally less harmful detergent brands with lower phosphate content, and less prone to cause water pollution, when ecological information on these product attributes is provided (Herberger and Buchanan, 1977; Henion, 1977).

Secondly, given that cultural biases do cause some product attributes to be more favourably processed than others, cognitive cultural differences would result in differential levels of importance being given to similar product attributes by ethnic and white culture groups. Differential ethnic adaptabilities therefore cause brand loyalties to be associated with distinct brand images on the basis of attribute importance. More pragmatically, the profiles suggest that there are distinct brand alternatives on the market, so that different brand preferences can be advantageously appealed to.

4. IMPORTANCE OF RECOMMENDATION BY FRIENDS

The importance of 'recommendation by friends' as an

attribute related to product choice, was significantly greater in the Asian ethnic, in comparison to the white consumer group. Within the Asian ethnic group, reference groups obviously play a significant role through 'word of mouth' activity, in information processing related to the laundry detergent product class, which, of itself has no social significance. The implied importance of reference groups is thus evident, within an ethnic language market where information processing is constrained by linguistic barriers, as evidenced, also, in the Hispanic Latin American market, with its strong in-group ties (Diaz-
~~~~~  
Albertini, 1979). Currently existing research evidence  
~~~~~  
on the close-knit integrated networks that link the Asian ethnic group structure, also provides substantive basis for the existence of reference group influence (Rex,
~~~~  
1967; Tambs-Lyche, 1976; Anwar, 1979).  
~~~~ ~~~~~ ~~~~~

Word-of-mouth recommendation for detergent attribute processing, while pointing conclusively to the existence of high levels of consumer loyalty to a single brand, collaborates the existing findings in Section 5:6, on
~~~~~  
significant Asian ethnic group loyalties to Proctor and Gamble's 'Daz', 45%, in contrast to its UK market share of 12%. The importance given to reference groups, also points to the distinct possibility that, Asian ethnic brand loyalties are characterised by a substantial element of habitual repeat purchase behaviour, thus implying the operation of a 'steady-state' equilibrium in

the distribution of detergent brand shares.

Since, however, consumer brand loyalties are known to develop over time, as a process of learning (Howard-Sheth theory of buyer behaviour), the existence of Asian ethnic brand loyalties, based on continuing group loyalty, points to their indefinite extension over time or, alternatively, to a destabilisation of the 'status quo' as Asian ethnic consumers move towards greater experimentation, making existing brand loyalties a transient phenomenon.

The importance of 'recommendation by friends' is also significant in its connotations with regard to the influence of ethnic retailers, on consumer brand choice. Evidence indicates that there is a large degree of overlap between Asian ethnic retailers and reference groups, along with their role as opinion leaders within the ethnic social network (Anwar, 1979). The influence of reference groups in the ~~~~~~ Negro market has also been noted to be greater than that existing for the white consumer markets (Bauer, Cunningham and Wortzel, 1965). According to existing research on black ~~~~~~ consumer motivations, Negro consumers are described as 'more likely to say that they find it useful to talk with someone ... about shopping decisions', (p.4). This trend is 'not nearly so strong within the white group.' However, retailers, despite their influence, cannot by themselves make or break a brand. Thus, Wall, 1979 ~~~~~~ summarises the position



of retailers:-

"Retailers have little to do with product positioning, and blacks are increasingly selecting brands as peer oriented status symbols and for other psychological reasons having very little to do with the retailers' influence" (p.60)

The findings emphasise the fact that, ethnic retailers may influence product purchase in the Asian ethnic segment, more than in the West Indian ethnic, or white consumer segments. But peer group influence, additionally, does exert a strong pull which can either enhance retailer influence or, alternatively, weaken it considerably.

#### SECTION 5:8

#### DISTRIBUTION OUTLETS FOR ETHNIC DETERGENT PURCHASING

Small independents served as distribution outlets to a significantly greater extent in the case of the Asian ethnic, in comparison to the white consumer group (58%:2%), thus substantiating Piper's, 1977 remark, on the use by the former, of '... small, Asian-run independents, rather than supermarket chains..'. West Indian ethnic consumers tended to use independents less than the Asian ethnic group but more than white consumers (14%:2%), though the difference was not as highly significant. The relative emphasis on supermarkets as outlets for detergent purchasing within the white market, is evident in retail data reports (MGN ~~~)

Marketing Manual, 1979), which state that "....of the  
~~~~~  
92,000 sales outlets estimated (1971 Census), for detergent
purchasing, detergents are essentially a grocery line,
'strong in self-service and supermarkets', with a good deal
of 'below the line' promotion by retailers."

The significantly greater patronage of ethnic independents by
Asian consumers, substantiates existing evidence on the
obvious proliferation of ethnic retailing (Rex, 1967; Anwar,
~~~~~  
1979), in the inner city areas, in order to cater  
~~~~~  
specifically to ethnic needs. Their inordinate use appears,
moreover, to be the result of Asian linguistic barriers, which
necessarily facilitate ethnic retailer-consumer interaction.
It is generated, additionally, due to ethnic retailer
influence operating as part of the ethnic social networks
(Anwar, 1979); (Chapter 9 gives a more detailed discussion on
~~~~~  
ethnic retailing). Brands promoted by ethnic retailers  
appear, in turn, to be a critical element in Asian ethnic  
purchase decisions. To substantiate this, it was found in  
market research studies (Rao, 1969), that store selection  
~~~~~  
does serve as an important intervening variable between brand
preferences and the end purchase. The influence of retailers
on consumer brand preferences, is cogently summarised by
Silberman, 1960:-
~~~~~

".. One of the oldest rules of retail selling....  
is that the sale is lost if the consumer is given  
more than three or four choices.."

Parallel research on the Negro market in the US indicates that though there was substantial use of local ghetto outlets with a minimal of choices in the past (Cox, 1960, Sinha, 1977), Negro consumers now shop relatively more in the supermarkets (Coyle, 1975), and discount chains (Sexton, 1971; Goodman, 1968; Feldman and Star, 1968), due to increasing social and economic mobility, and the tendency to shop nearer the work place, rather than in inner city neighbourhoods. The contrast between Negro and white retail outlet choices, is brought out by Bullock, 1961, who stressed that while white consumers shopped comparatively more in department stores, blacks used more of the low-price oriented, discount stores. Additionally, a comparative investigation between black and Japanese-Asian shoppers (Dalrymple, 1972), again found that Japanese consumers showed a significant preference for the 'price' oriented discount chains, while black consumers preferred the more prestige oriented stores. The findings from the present study, provide strong evidence of the similarity in discount store preferences for West Indian ethnic and white buyers in inner city areas, possibly due to the nature of the product category.

Further to this, low brand loyalty levels estimated for private brands, within the Asian (1%), West Indian ethnic (1%) and White (3%) groups, were consistent with the generally low UK market share of 11%, for all private brands (Mintel, 1980). Under the circumstances, however, the situation can be

assessed as one where private brands promoted by retailers to ethnic segments cannot in the future be precluded, in view of the fact that ethnic consumers constitute a primarily low income group with a high element of ethnic retail patronage. The impact of private brands within a price competitive environment has been noted by Weiss, 1963, for their effect on manufacturers labels:-

"... private brands can be often of the same quality as manufacturers brands and often come of the same manufacturers lines as do manufacturers' brands... The blunt truth is that manufacturers' presold brands and the pre-sold brands of wholesalers and retailers are becoming virtually indistinguishable. The lines of demarcation between them are becoming more and more illusionary..... " (p.105-106)

The use of product pricing by retailers, as a basic competitive weapon in promoting sales, can be considered an obvious underlying factor in the differences in brand orientation between the ethnic and white groups. In fact, as commented on by Retail Business, 1977, on retailer strategies to influence consumers, "... the retail trade expects to see heavy promotion 'below the line', on washing powders..'. The controversial manipulation by retailers, of 'below the line' expenditure in the detergent market, has nevertheless been susceptible to consumerist criticisms. As Mintel, 1980 reports, '.. At one time plastic daffodils, given away free with detergent packs, were a by-word for allegedly silly and unpopular methods of merchandising.'

More recently, ofcourse, 'price' has been the 'major promotional weapon'. From a marketing policy point of view this would imply that, for Asian ethnic groups, brand choices are a function of the retail influence of small independents, mainly due to the instore merchandising inputs of shelf space, product pack location and shelf display, and also susceptible to a fair amount of 'below-the-line' price promotion by ethnic retailers.

#### SECTION 5:9

#### SOURCES OF INFORMATION IN ETHNIC DETERGENT PURCHASING

In comparison to white consumers, the non-market 'friend' source, and 'word of mouth' communication through ethnic retailers, were significantly more important as sources of information, in influencing brand choices for the Asian ethnic consumer group. West Indian ethnic and white consumers were more similar, in their claim of relying on personal experience rather than solely informal 'friend' sources, for repeat purchase behaviour.

These findings substantiate previous research on the influence of informal sources, as modes of information (Rogers and Shoemaker, 1972; Rogers and Stanfield, 1968; Robertson, 1968; Pessemler, Burger and Tigert, 1967; Engel, Keggereis and Blackwell, 1969; Berning and Jacoby, 1974). Word-of-Mouth activity among black ethnic groups, in

encouraging 'fashion consciousness' specifically, has similarly been noted by Bauer, 1970. Additionally, in contrast to either 'friend' sources, or 'personal experience', commercial 'television advertising', was not, for any group, claimed as a source of information relied on most. From this it can be concluded that, while commercial information through advertising does not appear to have a direct influence on product purchasing, it could be expected to play an important role in product awareness, especially in the case of West Indian ethnic and white consumers, where 'personal experience' was the most influential, in product evaluation.

The changing consumer orientations for sources of information, are in line with declines in 'above the line' television expenditure by manufacturers, following the weight of criticism in the 1966 Monopolies Commission Report, on the promotional expenditure on household detergents (Mintel, 1980). Though appropriations are still considerably high, following incremental increases since 1977, their expenditure was justified in the need for continual promotion, in Mintel's, 1980 remark that 'sophisticated marketing companies do not advertise for fun and their defense is that their methods are effective...'.  
~~~~~

FUTURE MARKET TRENDS

According to trade sources (Economist Intelligence Unit), the market for detergents is likely to stay static for a period of years. Despite this, the continuing trend in R & D innovations in the detergent sector is highlighted in market intelligence reports (Mintel, 1980), according to which '....product improvements will continue.'. Enzymes are destined to obtain a larger share of the UK market at the expense of 'ordinary' soap powder detergents, and 'as the ownership of washing machines increases, the low suds products will also increase.' Major innovations are anticipated in the cold water detergents which have been on the American market, as also the liquid detergents, despite the unsuccessful attempt by the launch of Colgate's 'Dynamo' in the UK market.

The market is expected to continue to remain a duopoly, so that dominated as it is by the two giant manufacturers, it is difficult to foresee either company stealing a new product march over the other.

Both companies spend enormously on research. Procter and Gamble in this context, have long been regarded as 'the epitome of aggressive marketing' of fast moving consumer goods (fmcg), and, in the early post-war years, usually had the edge over Lever in terms of both product innovation and marketing. Recently however Lever's success has resulted in

fairly steady erosion of Proctor and Gamble's market share.

Given these circumstances, the inordinate brand loyalties especially in the Asian ethnic market, to Proctor & Gamble brands, notably 'Daz', assume added significance, both by way of disproportionate product consumption, as well as disproportionate 'group' loyalties, to a single brand. The obvious importance of the ethnic groups can be gauged in Mintel's, 1980 assessment of the detergent market '...In such
~~~~~  
a situation, profitability obviously depends on finding an unexploited slot in a crowded market... To generate greater profit, both must either expand the market, very difficult, or else substantially reduce selling costs, again very problematic in a market grown used to heavy advertising...'.  
~~~~~

SUMMARY AND CONCLUSIONS TO CHAPTER 5

The purpose in this chapter was to investigate the UK ethnic consumer segments, as they affect the laundry detergent product market. The summary below outlines the major facts, as they make for ethnic segmentation.

SUMMARY

1. On the basis of 1980 figures, the laundry detergent market constitutes 44% of the total market for cleaning products, and was valued at £287 million, in retail sales. The ethnic segment, constituting as it does, 3.9% of the population, by 1980 estimates, represents approximately £9.1 million in terms of consumer buying power, as a proportion of the UK market for this product sector.

2. DEMOGRAPHIC STRUCTURE

The UK ethnic consumer market for laundry detergents comprises two major segments, the Asian and the West Indian ethnic groups, which are, in both cases, distributed over the lower age groups and socioeconomic categories, in comparison to the UK consumer market. Detergent purchasing agents in the Asian ethnic segment constituted primarily male buyers, who also hold the effective buying power, in contrast to mainly female purchasing agents in

the West Indian ethnic and white markets. Female purchasers in the West Indian ethnic group also had higher economic activity levels and, therefore, buying power, in contrast to the white consumer group.

3. PRODUCT CONSUMPTION

Notably, the Asian and West Indian ethnic markets were 'heavy user' segments, distinguished from the overall market, by disproportionate product consumption in volume terms, mainly due to averaging larger household sizes.

4. PACK-SIZE PENETRATION

Significantly higher penetration levels for the larger, E-10, pack size existed within the Asian ethnic group, at 39 per cent, and also for the West Indian ethnic group at 23 per cent, in comparison to 6 per cent buyers in the white group. This was concluded as being a function, primarily of economy, and also the result of ethnic demographic structures, as evidenced by larger household sizes.

However, small pack sizes and weekly purchase frequencies still constituted the majority of purchases among ethnic as well as white inner-city area consumers. Purchase frequencies in the ethnic groups were, therefore, largely 'weekly' or else, 'monthly', depending on the pack size

purchased, while white consumers comprised a greater proportion of 'fortnightly' purchasers. These results are important from the manufacturers' point of view, considering that the market share of a brand is a function of the purchase size, unit price, and the brand purchase probability.

5. BRAND PREFERENCES

Brand loyalty levels did not vary significantly between the Asian ethnic (81 per cent), and white (82 per cent), groups. The West Indian ethnic segment had significantly lower levels (38 per cent), of 'sole brand' loyalty, indicating a simultaneously high proportion of brand switching activity.

In terms of consumer brand shares, the Asian ethnic segment exhibited disproportionately large, single brand loyalty levels to Proctor and Gamble's 'Daz', with a 45% ethnic market share, despite the fact that this was not the dominant brand on the market. 'Fairy Snow', another Proctor and Gamble brand, also had a high proportion of uniloyal consumers in this segment.

Contrasting evidence was presented for the West Indian ethnic and white consumer groups, with both manifesting high levels of 'single brand loyalty' to the market leader, 'Persil' (Lever), with 14% and 28% consumers,

respectively. There was very little loyalty to private brands across all three consumer groups.. Proctor & Gamble's 'Ariel', also has a high degree of overall 'penetration' within the Asian and West Indian ethnic segments without, however, any considerable loyalty levels.

This existing brand activity offers a highly competitive situation, in terms of manufacturers' brands. The competition in the Asian ethnic segment was largely between brands by the same manufacturer (P & G). Competition within the West Indian ethnic segment was subject to substantial brand switching, with several Proctor and Gamble brands competing against Levers' 'Persil', the only brand with any semblance of brand loyalty in this group.

6. PRODUCT ATTRIBUTES

The Asian ethnic segment attributed significantly higher mean ratings for 'whitening capacity', 'product price', 'recommendation by friends', and 'product fragrance', and significantly lower ratings for 'cleaning capacity' and 'mildness to clothes' and 'brand name', in comparison to white consumers. The West Indian segment gave a significantly higher mean rating to 'product price', but significantly lower mean ratings for 'mildness to clothes', 'brand name', and 'product fragrance', in

comparison to the white group. It was accordingly concluded that, subjective, non-price appeals, do prove attractive to a sizeable portion of Asian ethnic buyers.

These differing attribute profiles, thus provide an effective basis for ethnic segmentation analysis by brand choices, based on product attributes.

The above results point conclusively to the fact that, ethnic product purchasing effectively segments the Asian and West Indian ethnic cultural groups from the UK market, due to differential brand preferences and loyalties, pack-size penetration, volume consumption, purchase frequencies, and the differential importance of product attributes.

The underlying dynamics of word-of-mouth activity and reference group influence, operate within tightly knit kin structures and linguistically delineated group boundaries. In particular, habitual repeat purchase behaviour in the ethnic language market, appears to have emerged as an apparent solution to the consumer decision-process.

An important concluding implication is that brand loyalties, especially for well known brand names, once formed, would be very hard to erode due to the collective group resistance to fluctuating market conditions.

For the manufacturer, this implies coping with the high degree of control exercised by ethnic retailers over the Asian cultural segment, through the provision of adequate shelf space and instore displays. Within a wider context, ethnic retailer loyalties assume importance in future competitive strategies for ethnic market shares, by both 'retailers' and 'manufacturers' brands.

The West Indian ethnic segment in contrast, was more 'brand conscious' than 'brand loyal', in its market orientation. The small proportion of brand loyal buyers for the leading market brand thus constituted the hard core of 'prestige' or status buyers, adhering to brand names such as 'Persil', that imply quality. However, the segment, as a whole, was extremely price conscious, as evidenced in its tendency to dual and multi-brand buying.

Since brand preferences and loyalties emerge as biased responses to product characteristics, not all of which are critical, it could be inferred, on the basis of learning theory, that the reinforcement of certain product attributes, simultaneously decreases the effort in decision-making.

On a more pragmatic level, the findings suggest that it is possible to promote these segments separately, and to maximize incremental profits by pursuing marketing strategies for essentially the same product but targeting different ethnic cultures, via the selective promotion of different

product image variables.

Changing market conditions also imply that greater ethnic experimentation might disrupt existing tendencies in brand preferences, making the present stable behaviour take on the impression of a transient stage. For the marketer this implies that specialisation in the ethnic segments requires carefully planned market targeting. Under such circumstances, it can be concluded that any post-decision dissonance arising among ethnic target markets, could be effectively minimised by the circumstances of the buying decisions, namely, 'group loyalty', 'word of mouth' activity, brand commitment, retail patronage, and preference for product attributes, thus resulting in established ethnic brand loyalties, despite pricing fluctuations, or changes in competitive conditions.

Chapter 6 continues the analysis along similar lines, for the
~~~~~  
UK automobile market. In doing so, it highlights the differences in the decision-making process for extremely divergent product categories, and simultaneously draws out general strands, for effective ethnic targeting.

## CHAPTER 6

### ETHNIC SEGMENTATION IN THE AUTOMOBILE MARKET

#### INTRODUCTION

The investigation forwarded here, analyses the extent to which the automobile product class has penetrated into the Asian and West Indian ethnic groups in Britain, and ascertains whether they constitute sizeable segments within this product market.

Automobile purchasing represents a major decision for a durable good that is essentially a high risk product, involving a substantial financial outlay and, has, moreover, the social importance attached with its obvious visibility. This is summed up in a Mintel, 1978 assessment of the motor car industry:-

"Since the motor car is by far the largest and most expensive of all consumer durables, it is a key indicator for the whole UK economy.."

As a consumer decision category, it accordingly has precedents in previously conducted studies (Burns and Granbois, 1977), in the marketing research area. It is recognised that there are several sub-decision phases involved in car purchasing which include, among others, a specific technical knowledge of the product due to its

mechanical complexity, a concern with the aesthetic features such as car model/style and colour, as well as budgetary implications such as the price range to be considered. In terms of consumer research, this therefore offered a contrast to the habitual decision-making discussed in Chapter 5, with regard to the laundry detergent market.

The need for effective segmentation in the automobile market, has been evident for a long time, in order to capitalise on higher rates of return on investment. Its expediency as a policy alternative, is brought out in Smith's 1979 explanation:-

"Many companies are reaching the stage where car marketing is not profitable... Their core markets have already been developed to the point where additional advertising and selling expenditures are yielding no return. Therefore, the need for attention to smaller or fringe market segments, which may have small potentials individually, but are of crucial importance in the aggregate, is essential..."

Because of its commercial importance, as well as the high profits accruing to car marketing, segmentation analysis has typically relied heavily on consumer motivation research, which regards 'personality' as a important marketing variable, in view of its relation to the purchasing patterns of car buyers (Tucker and Painter, 1971). Market segmentation in the automobile category has, therefore, assumed the essential form of 'personality segmentation' (Birdwell and Dolich, 1970), based on marketing to different

personality types, resulting from a congruence in consumer ratings for 'self' and 'car' image concepts (Green, Wind and Jain, 1972).

More recently, the black market in the US has been increasingly recognised as a domestic growth segment, in terms of both, size and potential value (Forkan, 1979), and as one which offers tremendous opportunities (Bullock, 1961; Wortzel, 1965; Bauer and Cunningham, 1970), for selective marketing strategies. Quite significantly, differences in black consumer tastes, shopping patterns and media preferences, along with the higher expenditure by blacks on socially visible items, and their apparently greater concern with the symbolic value of goods, have drawn the attention of marketing and segmentation studies.

The study here, attempts to investigate the UK Asian and West Indian ethnic groups, and compares them in each instance with the white consumer market, on the decision-making aspects of automobile purchasing behaviour. In contrast to Chapter 5, it also lays stress on the personality and image dimensions considered by marketers, to be crucial motivational factors in automobile segmentation.

The UK car market size and value are first documented, in order to consider whether the ethnic groups constitute profitable segments within this product category.

SECTION 6:1  
~~~~~

UK CAR MARKET SIZE/VALUE
~~~~~

The UK car market constitutes a growth area, where the level of car ownership has been steadily rising since the past two decades. This is evidenced, particularly, in the increase in number of new vehicle registrations, from 737,000 in 1963, to a high of 1,484,622 during 1981. It is obvious that automobile ownership, when considered over the long term, does not appear to have been seriously affected by the industrial, political, economic and social ills which have made the British car manufacturers unable to match these growth targets.

Over the short term, however, the domestic car market has weakened considerably. Thus, new passenger car registrations in the first ten months of 1981 are estimated to have totalled 1,322,698 units, a 3.5 per cent decline, compared to the corresponding period in 1980 (Motor Business, 1982).  
~~~~~  
Official figures for car production from the Department of Industry, also indicated that the UK output for 1981 over the first nine months was 619,739 units, a fall of 7.5 per cent, compared to the output in the corresponding period over 1980. According to figures given by the Society of Motor Manufacturers and Traders (SMMT), the UK car production in 1980, was estimated at only 923,744, as displayed in

Table 6:1 below.
~~~~~

TABLE 6:1  
~~~~~

UK PASSENGER CAR PRODUCTION
~~~~~

<u>UK PASSENGER CAR PRODUCTION</u>	<u>1980 JAN-OCT (UNITS)</u>
HOME	574,152
EXPORT	349,592
[TOTAL]	923,744

SOURCE: MOTOR BUSINESS, AUGUST 1982

It is evident that the market is far from saturated, as shown by a comparison of output and new vehicle registrations, and offers considerable potential for British manufacturing and production.

There has, rather, been a paradoxical rise in imported car sales at the expense of UK producers, a trend inherent in many other consumer product fields, that have been marked by a steady decline in the manufacturing industries. While British car production has remained virtually constant, between 1.7-1.8 million units annually over the 1970's decade (Market Research Great Britain, 1980), imports have been  
~~~~~  
steadily rising and, accounted in 1980, for 1.1 million or

approximately 42.2 per cent of the estimated 2.6 million units new car sales, as depicted in Table 6:2.
~~~~~

Apart from the significance of Japanese imports, a recent trend has been the sale of smaller, imported cars, a feature accentuated by the fuel crisis of 1974. Overseas competition developed subsequently, with France in the EEC supplying one-third of Britain's imported cars, the sales of French cars being 60 per cent Renault, followed by Germany and Japan.

Despite imported car trends, it was estimated (Motor Business, 1982), that up to the end of October 1981, UK produced cars took 44.1 per cent of the market, compared to a proportion of 42.2 per cent in the first ten months of 1980 (Table 6:2). This development, a retreat by 1.9% of the importers' share, represents '..... the first positive indication that the domestic industry is capable of fighting back against the remorseless advance of the importers', who have been dominant in influencing the UK passenger car market throughout the 1970's.

In fact, Motor Business, 1978 reported on the expanding UK demand for this product category:-

"The UK passenger car market has been booming merrily ahead ... . Supplies of the UK built cars have increased... but once again the importers have been the main beneficiaries. Their sales have shot up... . This means that imported penetration stands at 48.9 per cent... and if anything, the trend is accelerating...."



TABLE 6:2  
~~~~~

PERCENTAGE SHARES OF NEW CAR REGISTRATIONS IN THE UK
~~~~~  
BY MANUFACTURER'S ORIGIN  
~~~~~

| | <u>1980</u>
JAN-OCT | <u>1981</u>
JAN-OCT | <u>% CHANGE</u> |
|-----------------|------------------------|------------------------|-----------------|
| UK | 42.2 | 44.1 | 1.9 |
| IMPORTED | 57.8 | 55.9 | -1.9 |
| <u>of which</u> | | | |
| EEC | 36.6 | 36.2 | -0.6 |
| JAPAN | 12.5 | 11.5 | -1.0 |
| EFTA | 1.9 | 2.0 | 0.1 |
| COMECON | 1.8 | 2.0 | 0.2 |
| OTHERS | 4.8 | 4.2 | -0.6 |
| [TOTAL] | [100.0] | [100.0] | |

SOURCE: MOTOR BUSINESS, AUGUST 1982

A Mintel, 1978 analysis of UK car penetration by source, also
~~~~~  
indicated that there was a relative decline in the British  
proportion of new cars sold, and an increase in EEC and  
Japanese imports. It is obvious from the trends, that net  
production and sales rates have been in line, only because UK  
car exports broadly balanced the imported units. Commenting  
on the Japanese car industry, Motor Business, 1978 further  
~~~~~  
reported:-

"... There is still no pause for the Japanese Motor
industry. Production of passenger cars in the
first nine months of 1978 showed ...a rise of 11.3
per cent over 1977. Exports in the same period
have increased by 'only' 8.3 per cent... At this
level they represent 53 per cent of output."

While imported cars have established a stable share of sales, particularly during the 1970's, this does not undermine the fact that the consistent best seller in the UK market has continued to remain the British produced, 'Ford Cortina'. As Motor Business, 1980 reports:-
~~~~~

"No other manufacturer came near to toppling Ford from its now traditional role of leading supplier to the UK car market. The company's sales fell by slightly less than the average for the total market, thereby resulting in its market penetration rising slightly..."

The up-turn in UK registrations of British cars, noted in Table 6:3, was commented on, in subsequent Motor Business, ~~~~~  
1982 reviews:-  
~~~~~

"At the time when the overall consumer market has retreated by 3.5 per cent, the domestic manufacturers have boosted sales by 1 per cent (mainly BL's Metro), and importers have fallen by 6.8 per cent. The main casualty has been Japan whose sales have declined by 11.9 per cent, and the EEC, by 4.9 per cent. In volume terms, the EEC has come off worse."

The positive market trend, for Ford models in particular, is also noted in market shares by car sales, as printed in the Motor Trader (Market Research Great Britain, 1982).
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TABLE 6:3

~~~~~

NEW CAR REGISTRATIONS IN THE UK

~~~~~

BY MANUFACTURER'S ORIGIN

~~~~~

| | <u>1980</u> | <u>1981</u> | <u>% CHANGE</u> |
|------------------|-------------|-------------|-----------------|
| | JAN-OCT | JAN-OCT | |
| UK | 578,115 | 583,692 | 1.0 |
| IMPORTED | 792,733 | 739,006 | - 6.9 |
| <u>of which:</u> | | | |
| EEC | 503,866 | 479,224 | - 4.9 |
| JAPAN | 171,897 | 151,514 | -11.9 |
| EFTA | 26,498 | 26,414 | 3.9 |
| COMECON | 24,849 | 25,814 | -14.6 |
| [TOTAL] | [1,370,848] | [1,322,698] | - 3.5 |

SOURCE: MOTOR BUSINESS, 1982

Thus, the figures in Table 6:4 show the impressive positions of the Ford 'Escort' and 'Cortina' among the best-selling models. Again, Vauxhall's impressive showing in 1981, was indicated as having been due to 'assembled' units of Carlton and Cavalier models, which had not previously been classified, in the official production figures.

Other important aspects contributing to changing trends in new car registration by make, as well as production output, appear in British Leyland's end to 'its downward production spiral'. This was attributed entirely to the increased volume production of the 'Metro', which now accounts for 50 per cent of the Austin Morris division output. The Metro's recent success has, however, been achieved largely at the

expense of the 'Mini'. This was evident in Motor Business's, 1982 ~~~~~ circumspect remark, that the company itself, is largely dependent on a 'product led' recovery for a change of fortunes.

Additionally, models of the DeLorean, the 'futuristic, gull winged car...', also increased production to about 80 per cent per day, in the Northern Ireland plant, even though entirely for export purposes.

TABLE 6:4
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UK CAR MARKET SHARES  
~~~~~

| <u>CAR MAKE</u> | <u>1981</u>
<u>TOP TEN SELLERS</u>
<u>OVER FIRST 11 MONTHS</u>
<u>UNITS SOLD</u> |
|---------------------|---|
| FORD ESCORT | 160,042 |
| FORD CORTINA | 132,302 |
| AUSTIN METRO | 110,068 |
| FORD FIESTA | 104,650 |
| VAUXHALL (CAVALIER) | 95,034 |
| VAUXHALL (ASTRA) | 43,701 |
| TRIUMPH ACCLAIM | 40,705 |
| VOLVO 300 SERIES | 29,215 |
| DATSUN SUNNY | 27,901 |
| DATSUN CHERRY | 27,450 |

SOURCE: MOTORSTAT, NOVEMBER 1982

However, changing trends in the UK car market cannot be ignored, as indicated in the data forwarded in Table 6:5. ~~~~~ Thus, a 1 per cent increase for UK-made cars during 1980-1981, could not hide the individual declines for all major car manufacturers, except British Leyland.

For instance, a 3.3 per cent decline in Ford's output, was attributed not to the company's setback in the UK (since Ford UK produced cars have risen in 1981), but to cutbacks in shipments from the West German, Belgian and Spanish factories which source the Granada and Capri models, and the ending of exports (of the old Escort model), to the Far East and Australia. Another recent decline was noted in the 'Talbot' output by 23.2 percent, the latter's main recent activity, being the provision of KD kits (Avenger and Sunbeam), for assembly in Iran. Moreover, the largest Japanese importer, 'Datsun', was also estimated as having experienced a sales fall of 8.8 per cent, even though Toyota and Honda, both Japanese models, recorded increases.

Remarking on existing and future trends for Ford models, Motor Business, 1982, reports assess the situation:-
~~~~~

"The Escort stands a chance of becoming the best selling model in 1982, due to the supply shortage of the Cortina when the Sierra is introduced. Ford's main problem in terms of bettering its market position, rests with the ubiquitous nature of the product.... With every other person seemingly driving a Ford, further sales become almost self defeating...."

TABLE 6:5  
~~~~~

NEW UK CAR REGISTRATIONS BY MAKE
~~~~~

	<u>1980</u>	<u>1981</u>	<u>% CHANGE</u>
FORD	417,761	403,975	- 3.3
BL	244,336	256,811	5.1
GENERAL			
MOTORS	120,632	109,120	- 9.5
<u>PSA:</u>	129,176	102,524	-20.6
TALBOT	81,369	62,530	-23.2
CITROEN	25,292	24,101	- 4.7
PEUGEOT	22,512	15,893	-29.4
DATSUN	89,619	81,718	- 8.8
RENAULT	78,593	63,820	-18.8

SOURCE: MOTOR BUSINESS: 1982

Given these circumstances, the UK car market is at an interesting stage. The most intriguing issue, namely the reaction of the fleet car market to a radically different shape as the Ford 'Sierra' with a hatchback, also applies to private car markets within both, the ethnic and white groups.

## PART 1

### SECTION 6:2

#### EMPIRICAL EVIDENCE ON ETHNIC AUTOMOBILE PURCHASING

This section presents the major empirical aspects of automobile purchasing within the Asian and West Indian ethnic groups respectively, and compares them with the white car owning market, in each instance. The various facets relating to the car purchase decision-making structure, are presented in Tables 6:6 and 6:7 accordingly.

#### AUTOMOBILE MARKET CONTROL

A comparative analysis indicated that male buyers were the main purchasers and car owners for the automobile product class in the Asian (99 per cent), West Indian ethnic (93 per cent), as well as the white segment (93 per cent). Minimal differences that existed, were not, however, important enough to be consequential. From the findings, it is evident that female car owners do not as yet signify as important purchasers in the automobile product market.

#### AUTOMOBILE PURCHASING LEVELS BY AGE STRUCTURE

The Asian, West Indian ethnic and white car owners were compared on the proportions within each age market.



TABLE 6:6

## AUTOMOBILE PURCHASING IN THE ASIAN ETHNIC SEGMENT

	<u>WHITE</u>		<u>ASIAN</u>		<u>X<sup>2</sup></u>	<u>SIG. LEVEL</u>	<u>DIRECTION</u>
	(N=86)		(N=200)				
	N	%	N	%			
<u>CAR OWNERSHIP</u>							
CAR OWNERS	33	38	148	74	34.4	.001	ASIAN
NON CAR-OWNERS	53	62	52	26	34.4	.001	WHITE
	N=86	[100]	N=200	[100]			
<u>CAR MARKET CONTROL</u>							
MALE CAR OWNERS	31	93	147	99	8.67	.01	ASIAN
FEMALE CAR OWNERS	2	7	1	7	8.67	.01	WHITE
	N=33	[100]	N=148	[100]			
<u>AGE STRUCTURE OF CAR BUYERS</u>							
25-34 yrs	2	6	44	30	9.27	.01	ASIAN
35-44 yrs	7	21	71	48	9.00	.01	ASIAN
45-54 yrs	15	46	31	21	7.30	.01	WHITE
55-64 yrs	7	21	2	1	36.74	.001	WHITE
65+ yrs	6	-	-	-	-	-	
	N=33	[100]	N=148	[100]			
<u>SOCIAL CLASS OF CAR BUYERS</u>							
AB	5	15	6	4	4.03	.05	WHITE
C1/C2	15	46	19	13	16.74	.001	WHITE
D/E	13	39	123	83	29.9	.001	ASIAN
	N=33	[100]	N=148	[100]			
<u>NEW CAR OWNERSHIP</u>							
NEW CAR OWNERS	26	79	57	39	16.04	.001	WHITE
USED CAR OWNERS	7	21	91	61	16.04	.001	ASIAN
	N=33	[100]	N=148	[100]			
<u>PRESENT CAR MAKE</u>							
FORD CORTINA	2	6	75	51	23.80	.001	ASIAN
FORD (OTHER)	5	15	4	3	6.41	.05	WHITE
VAUXHALL	1	3	4	3	.23	NS	-
LEYLAND	5	15	13	9	.61	NS	-
DATSUN	2	6	12	8	.57	NS	-
VOLVO	1	3	4	3	.23	NS	-
OTHER	17	52	36	23	8.36	.01	WHITE
	N=33	[100]	N=148	[100]			
<u>PREVIOUS CAR OWNERSHIP</u>							
OWNED CAR							
PREVIOUSLY	22	67	53	36	9.35	.01	WHITE
FIRST TIME BUYERS	11	33	95	64	9.35	.01	ASIAN
	N=33	[100]	N=148	[100]			
<u>BRAND PENETRATION FOR NEW CAR OWNERS</u>							
FORD	4	15	4	7	.63	NS	-
DATSUN	2	7	49	86	49.5	.001	ASIAN
OTHER (VOLVO/ PEUGEOT/CITROEN/ LEYLAND	6	27	14	26	.04	NS	-
	N=22	[100]	N=53	[100]			

TABLE 6:6 (CONTD)

	<u>WHITE</u>		<u>ASIAN</u>		<u>X<sup>2</sup></u>	<u>SIG.</u>	<u>DIRECTION</u>
<u>PREVIOUS CAR MAKE</u>	N	%	N	%			
FORD	14	64	38	72	0.93	NS	-
DATSUN	2	9	1	2	0.64	NS	-
OTHER (LEYLAND etc.)	6	27	14	26	0.04	NS	-
	N=22	[100]	N=53	[100]			
<u>RETAIL OUTLET FOR CAR PURCHASE</u>							
DEALER	26	79	54	36	25.40	.001	WHITE
AUCTION	6	18	72	49	11.50	.001	ASIAN
INFORMAL (FRIEND)	1	3	22	15	4.55	.05	ASIAN
	N=33	[100]	N=148	[100]			
<u>INFORMATION SOURCE FOR CAR PURCHASE</u>							
PERSONAL USE	6	18	6	4	6.56	.05	WHITE
DEALER/COMMERCIAL (MARKET SOURCE)	21	64	37	25	16.76	.001	WHITE
INFORMAL/FRIEND	6	18	105	71	33.90	.001	ASIAN
NON MARKET SOURCE	N=33	[100]	N=148	[100]			
<u>CAR PURCHASE DECISION TIME</u>							
3-6 mths	7	21	37	25	0.46	NS	-
6-12 mths	26	79	111	75	0.46	NS	-
	N=33	[100]	N=148	[100]			
<u>NUMBER OF MAKES CONSIDERED</u>							
ONLY ONE MAKE	10	31	111	76	23.53	.001	ASIAN
2-3 MAKES	22	69	5	6	23.53	.001	WHITE
OPEN CHOICE	1	1	32	18	5.54	.05	ASIAN
	N=33	[100]	N=148	[100]			
<u>DECISION-MAKING STRUCTURE</u>							
SELF	9	27	5	3	18.36	.001	WHITE
JOINT	21	64	6	4	70.80	.001	WHITE
FRIENDS/KIN	3	9	137	93	111.3	.001	ASIAN
	N=33	[100]	N=148	[100]			
<u>SUB-DECISION STRUCTURE</u>							
<u>CAR MAKE</u>							
SELF	15	46	3	2	52.05	.001	WHITE
JOINT	15	46	3	2	52.05	.001	WHITE
FRIENDS	3	8	142	96	133.2	.001	ASIAN
	N=33	[100]	N=148	[100]			
<u>CAR MODEL/STYLE</u>							
SELF	9	27	4	2	20.8	.001	WHITE
JOINT	20	61	5	3	69.5	.001	WHITE
FRIENDS	4	12	139	95	113.8	.001	ASIAN
	N=33	[100]	N=148	[100]			
<u>CAR COLOUR</u>							
SELF	4	12	99	67	39.04	.001	ASIAN
JOINT	29	88	44	30	35.50	.001	WHITE
FRIENDS	-	-	5	3	0.41	NS	-
	N=33	[100]	N=148	[100]			
<u>CAR PRICE</u>							
SELF	27	82	96	65	2.82	NS	-
JOINT	5	15	2	1	10.35	NS	-
FRIENDS	1	3	50	34	14.17	.001	ASIAN
	N=33	[100]	N=148	[100]			

TABLE 6:7

## AUTOMOBILE PURCHASING IN THE WEST INDIAN ETHNIC SEGMENT

	<u>WHITE</u> (N=86)		<u>WEST INDIAN</u> (N=22)		<u>X<sup>2</sup></u>	<u>SIG. LEVEL</u>	<u>DIRECTION</u>
	N	%	N	%			
<u>CAR OWNERSHIP</u>							
CAR OWNERS	33	38	14	63	6.3	.05	WEST INDIAN
NON CAR-OWNERS	53	62	6	27	6.3	.05	WHITE
	N=86	[100]	N=22	[100]			
<u>CAR MARKET CONTROL</u>							
MALE OWNERS	31	93	13	93	0.26	NS	-
FEMALE OWNERS	2	7	1	7	0.26	NS	-
	N=33	[100]	N=14	[100]			
<u>AGE STRUCTURE OF CAR BUYERS</u>							
25-34 yrs	2	6	2	14	2.24	NS	-
35-44 yrs	7	21	7	50	5.39	.05	WEST INDIAN
45-54 yrs	15	46	4	29	0.57	NS	-
55-64 yrs	7	21	1	7	2.30	NS	-
65+ yrs	2	6	-	-	-	NS	-
	N=33	[100]	N=14	[100]			
<u>SOCIAL CLASS OF CAR BUYERS</u>							
AB	5	15	2	14	0.14	NS	-
C1/C2	15	46	3	22	1.49	NS	-
DE	13	39	9	64	6.50	.05	WEST INDIAN
	N=33	[100]	N=14	[100]			
<u>NEW CAR OWNERSHIP</u>							
NEW CAR OWNERS	26	79	3	22	11.36	.001	WHITE
USED CAR OWNERS	7	21	11	78	11.36	.001	WEST INDIAN
	N=33	[100]	N=14	[100]			
<u>PRESENT CAR MAKE</u>							
FORD CORTINA	2	6	3	21	2.41	.10	WEST INDIAN
FORD (OTHER)	5	15	3	21	.25	NS	-
VAUXHALL	1	3	1	7	.40	NS	-
LEYLAND	5	15	1	7	.07	NS	-
DATSUN	2	6	1	7	.63	NS	-
VOLVO	1	3	1	30	9.31	.01	WEST INDIAN
OTHER (OPEL/CITROEN/etc)	17	52	1	7	6.42	.05	WHITE
	N=33	[100]	N=14	[100]			
<u>PREVIOUS CAR OWNERSHIP</u>							
PREVIOUS CAR OWNER	22	67	9	64	.19	NS	-
FIRST TIME BUYERS	11	33	5	36	.19	NS	-
	N=33	[100]	N=14	[100]			
<u>BRAND PENETRATION IN NEW CAR OWNERS</u>							
FORD	4	15	1	33	2.51	NS	-
DATSUN	2	7	1	33	5.61	.05	WEST INDIAN
OTHER	20	78	1	34	.84	NS	-
	N=26	[100]	N=3	[100]			

TABLE 6:7 (CONTD)

	<u>WHITE</u>		<u>WEST INDIAN</u>		<u>X<sup>2</sup></u>	<u>SIG. LEVEL</u>	<u>DIRECTION</u>
	N	%	N	%			
<u>PREVIOUS CAR MAKE</u>							
FORD	14	64	5	56	.0012	NS	-
DATSUN	2	9	1	11	.71	NS	-
OTHER	6	27	3	33	.69	NS	-
	N=22	[100]	N=9	[100]			
<u>RETAIL OUTLET FOR CAR PURCHASE</u>							
DEALER	26	79	3	22	11.36	.001	WHITE
AUCTION	6	18	9	64	4.39	.05	WEST INDIAN
INFORMAL FRIEND SOURCE	1	3	2	14	11.85	.001	WEST INDIAN
	N=33	[100]	N=14	[100]			
<u>INFORMATION SOURCE FOR CAR PURCHASE</u>							
PERSONAL USE	6	18	6	43	39.10	.001	WEST INDIAN
DEALERS/COMMERCIAL (MARKET SOURCES)	21	64	2	14	15.30	.001	WHITE
INFORMAL/FRIEND NON-MARKET SOURCE	6	18	6	43	39.10	.001	WEST INDIAN
	N=33	[100]	N=14	[100]			
<u>CAR PURCHASE DECISION TIME</u>							
3-6 mths	7	21	3	22	.16	NS	-
6-12 months	26	79	11	78	.16	NS	-
	N=33	[100]	N=14	[100]			
<u>NUMBER OF MAKES CONSIDERED</u>							
ONLY ONE MAKE	10	30	2	13	.94	NS	-
2-3 MAKES	22	68	11	78	.94	NS	-
OPEN CHOICE	1	2	1	9	-	-	-
	N=33	[100]	N=14	[100]			
<u>DECISION MAKING STRUCTURE</u>							
SELF	9	27	8	57	5.20	.05	WEST INDIAN
JOINT	21	64	4	29	3.54	.10	WHITE
FRIENDS	3	9	2	14	1.09	NS	-
	N=33	[100]	N=14	[100]			
<u>SUB-DECISION STRUCTURE</u>							
<u>CAR MAKE</u>							
SELF	15	46	10	71	3.80	.10	WEST INDIAN
JOINT	15	46	3	22	1.49	NS	-
FRIENDS/KIN	3	8	1	7	.12	NS	-
	N=33	[100]	N=14	[100]			
<u>CAR MODEL/STYLE</u>							
SELF	9	27	9	64	7.37	.01	WEST INDIAN
JOINT	20	61	4	29	2.85	NS	-
FRIENDS/KIN	4	12	1	7	.0001	NS	-
	N=33	[100]	N=14	[100]			
<u>CAR COLOUR</u>							
SELF	4	12	10	71	13.8	.001	WEST INDIAN
JOINT	29	88	4	29	10.4	.001	WHITE
FRIENDS/KIN	-	-	-	-	-	-	-
	N=33	[100]	N=14	[100]			
<u>CAR PRICE</u>							
SELF	28	85	11	78	.89	NS	-
JOINT	5	15	3	22	.89	NS	-
	N=33	[100]	N=14	[100]			

The evidence indicated that Asian and West Indian ethnic groups were, in each case, spread over a lower age distribution. Thus, the Asian ethnic group had a proportion of 30 per cent in the 25-34 yrs category, in comparison to 6 per cent white car owners ( $X^2=9.27$ ,  $p < .01$ ), and a further 48 per cent in the 35-44 yrs category compared to 21 per cent for the white group ( $X^2=9.0$ ,  $p < .01$ ).

On a comparable level, the West Indian ethnic group had a significantly higher proportion (50 per cent), in the 35-44 yrs category ( $X^2=5.39$ ,  $p < .05$ ), in contrast to white car owners.

#### AUTOMOBILE PURCHASING LEVELS BY SOCIOECONOMIC STRUCTURE

The ethnic groups were compared in each instance, with the white group, to identify differences in the proportions of car owners within each socioeconomic category. The findings indicated that a significantly higher proportion of Asian ethnic car owners (83 per cent), were in the D/E blue collar categories, in comparison to 39 per cent for the white group ( $X^2=29.9$ ,  $p < .001$ ).

Similar evidence was also observed in the case of the West Indian ethnic group (64 per cent in comparison to 39 per cent), with  $X^2=6.5$ ,  $p < .05$ .

## AUTOMOBILE PRODUCT PENETRATION IN THE ETHNIC MARKET

'Private car ownership' had penetrated to a significantly greater extent within the Asian and West Indian ethnic segments, in comparison to the white car-owning market. Thus, the car owning segment within the Asian ethnic group was estimated at 74 per cent, compared to a proportion of 38 per cent in the white market, with  $X^2=34.4$  and  $p \leq .001$ .

A similarly high proportion of car owners existed within the West Indian ethnic segment (63 per cent), in comparison to 38 per cent noted for white car owners, with  $X^2=6.3$ ,  $p \leq .05$ , though the difference in this latter case, was not as pronounced as for the Asian ethnic segment. It is obvious from this evidence, that there was a larger 'private ownership' car market in the Asian and West Indian ethnic groups, than in the white market.

## NEW CAR OWNERSHIP

An examination of the levels of 'new car ownership' indicated a predominance of 'used car owners' within the Asian ethnic group (61 per cent), in comparison to 21 per cent for the white group ( $X^2=16.04$ ,  $p \leq .001$ ).

Similar findings were observed for the West Indian ethnic group, with a proportion of 78 per cent in comparison to the 21 per cent noted for the white group ( $X^2=11.36$ ,  $p \leq .001$ ).

'New car owners', were thus significantly fewer for both ethnic groups, in comparison to the proportion in the white market.

#### PREVIOUS CAR OWNERSHIP

Consumer groups were compared on levels of 'previous car ownership', to the extent that it reflected past purchase experience among car buyers.

The evidence indicated that the Asian ethnic segment contained a proportion of 36 per cent car owners, who had owned a car previous to the existing purchase. In contrast a much higher proportion, 67 per cent, of the white group had been previous car owners ( $X^2=9.35$ ,  $p \leq .01$ ). There was no such significant difference in the proportions of West Indian ethnic (64 per cent), and white groups (67 per cent), who claimed to have owned a car previously.

#### AUTOMOBILE BRAND PENETRATION IN THE ETHNIC MARKET

A comparison of automobile penetration levels by car make, indicated that ownership of the 'Ford Cortina' was, in each instance, significantly greater for the Asian (51 percent), and West Indian (21 per cent), ethnic groups, than for 6 per cent white, private car owners.

The difference between West Indian and white owners however,



was significant, only for a  $X^2$  value of 2.41, at a level of  $p \leq .10$ .

A breakdown of 'new car owners' by the proportions owning 'Ford' and 'Datsun' (the brands with the highest penetration in the Asian ethnic market), indicated that the Asian ethnic group had a significantly higher penetration of new, Datsun cars (86 per cent), compared to the proportion (7 per cent), in the white car market ( $X^2 = 49.5$ ,  $p < .001$ ). This difference was also significant for the West Indian ethnic group at a  $X^2$  value of 5.61, with  $p < .05$ .

An investigation of car make at the level of 'previous car ownership', further indicated a remarkably high proportion of 'new' Datsun car owners in the Asian ethnic group, in relation to their previous ownership of Ford makes, in contrast to the white group. West Indian ethnic car owners did not show any such differences. Thus, ownership levels for 'new' Datsun cars were of the order Asian:West Indian:White=86%:33%:7%. In contrast, 'previous' Ford levels were of the order, Asian:West Indian:White=72%:56%:64%.

#### IMPORTANCE OF AUTOMOBILE PRODUCT ATTRIBUTES IN ETHNIC PURCHASING

The Asian and West Indian ethnic, and white consumer groups were compared on the mean importance ratings assigned for six, automobile specific product attributes (Tables 6:8 and 6:9), using an interval scale with a value '5' denoting 'very

unimportant' and '1' denoting 'very important'. The items examined were 'car reliability', 'car performance', 'car price', 'product reputation', 'recommendation of friends', and 'importance of dealers in car choice'.

Differences in mean ratings for the Asian ethnic and white groups, were not found statistically significant on 'car performance', 'price' and 'product reputation'.

However, the two groups differed significantly on 'recommendation of friends' ( $p \leq .01$ ), and 'importance of dealers' ( $p \leq .001$ ), with higher ratings by the Asian ethnic group. While all mean ratings were in the positive direction, 'car reliability' as a product attribute, was rated higher by the white group.

The West Indian ethnic group differed from the white group in significantly lower importance ratings given to 'product reliability' ( $p \leq .001$ ), 'performance' ( $p \leq .001$ ), 'price' ( $p \leq .001$ ), 'product reputation' ( $p \leq .001$ ), and 'dealers' ( $p \leq .05$ ). The difference was not significant for 'recommendation of friends'.

TABLE 6:8

MEAN IMPORTANCE RATINGS FOR AUTOMOBILE PRODUCT ATTRIBUTES

IN THE ASIAN ETHNIC SEGMENT

	<u>ASIAN</u>	<u>WHITE</u>	<u>'t'</u>	<u>SIG.</u>	<u>DIRECTION</u>
	(N=13)	(N=33)		<u>LEVEL</u>	
CAR RELIABILITY	1.54	1.12	1.87	.10	WHITE
PERFORMANCE	1.31	1.33	-0.14	NS	-
PRICE	1.46	1.57	-0.48	NS	-
PRODUCT					
REPUTATION	1.88	2.00	0.43	NS	-
RECOMMENDATION					
OF FRIENDS	2.07	2.96	-3.38	.01	ASIAN
IMPORTANCE OF					
DEALERS	1.84	2.70	-4.08	.001	ASIAN

\* A VALUE OF '1' = VERY IMPORTANT, '5' = VERY UNIMPORTANT

TABLE 6:9

MEAN IMPORTANCE RATINGS FOR AUTOMOBILE PRODUCT ATTRIBUTES

IN THE WEST INDIAN ETHNIC SEGMENT

	<u>WEST</u>	<u>WHITE</u>	<u>'t'</u>	<u>SIG.</u>	<u>DIRECTION</u>
	<u>INDIAN</u>			<u>LEVEL</u>	
	(N=13)	(N=33)			
CAR RELIABILITY	5.00	1.12	17.5	.001	WHITE
PERFORMANCE	4.15	1.33	9.25	.001	WHITE
PRICE	4.76	1.57	12.70	.001	WHITE
PRODUCT					
REPUTATION	4.32	2.00	5.84	.001	WHITE
RECOMMENDATION					
OF FRIENDS	2.85	2.96	-0.94	NS	-
IMPORTANCE					
OF DEALERS	3.31	2.70	2.25	.05	WHITE

\* A VALUE OF '1' = VERY IMPORTANT, '5' = VERY UNIMPORTANT

\* THE LOWER THE MEAN SCORE, THE MORE IMPORTANT THE ATTRIBUTE

CONGRUENCE OF 'SELF' AND 'CAR' IMAGE CONCEPTS  
IN ETHNIC AUTOMOBILE PURCHASING

Two sets of studies were conducted:-

1. Congruence in semantic profiles obtained from mean item ratings on the 'self' image. The Asian and West Indian ethnic 'self' concepts were in each case, compared with white 'self' concepts.
2. Congruence in semantic profiles obtained from mean item ratings given to the 'self' and 'car' concepts. The Asian ethnic and white groups were in each instance, compared for the degree of congruity in the 'self' and 'car' image ratings. The West Indian ethnic group was not considered for this latter investigation because of low sample response to the questionnaire rating sheet on the 'car image' concept.

The purpose of these two studies was to test for differences in ethnic and white personality types for the same item pool, which consisted of 21 adjectives, used in previous studies on automobile perception (Birdwell, 1969).

Differences in item ratings, along with significance levels, as well as contrast profiles for ethnic and white groups, are provided in Appendices D and E, and took the following form.

## SELF IMAGE COMPARISONS

1. The Asian ethnic and white consumer groups differed (Appendix D:2), on overall mean personality scores (Asian:White=4.69:4.52), with  $p \leq .05$ . Specifically, they differed on items 1,2,3,7,8,9,16,20,21, namely, 'unsophisticated-sophisticated' ((Asian:White=5.27:3.67;  $p \leq .001$ ), 'dull-exciting' (4.92:3.97;  $p \leq .01$ ), 'weak-strong' (4.70:4.08;  $p \leq .05$ ), 'old-young' (4.80:3.51;  $p \leq .001$ ), 'clumsy-nimble' (5.28:4.70;  $p \leq .01$ ), 'complex-simple' (5.44:3.24;  $p \leq .001$ ), 'calm-lively' (4.08:5.70;  $p \leq .001$ ), 'masculine-feminine' (3.08:5.08;  $p \leq .001$ ), and 'cramped-spacious' (5.27:4.54;  $p \leq .01$ ). Mean ratings by the Asian ethnic group were higher than those given by the white group on all, except items 16 ('calm-lively') and 20 ('masculine-feminine').
2. The West Indian ethnic and white groups differed (Appendix D:3), significantly on overall self-concept mean ratings (4.95:4.52), with  $p \leq .05$ . Specifically, they differed on items 1,3,4,5,9,14,17,19,21, namely those relating to 'unsophisticated-sophisticated' (West Indian:White=4.60:3.67;  $p \leq .01$ ), 'weak-strong' (5.00:4.08;  $p \leq .05$ ), 'sad-happy' (4.93:5.91;  $p \leq .01$ ), 'conventional-eccentric' (3.86:2.67;  $p \leq .05$ ), 'complex-simple' (3.80:3.24;  $p \leq .05$ ), 'slow-swift' (5.67:4.56;  $p \leq .05$ ), 'thrifty-indulgent' (5.53:3.92;  $p \leq .01$ ), 'deliberate-impulsive' (5.53:6.29;  $p \leq .01$ ), and 'cramped-

spacious' (5.66:4.54;  $p \leq .01$ ). Mean ratings given by the West Indian ethnic group were higher on all, except items 4 and 19, i.e., 'sad-happy' and 'dangerous-safe'.

On an intragroup level, comparisons of the 'car' and 'self' concepts took the following form.

1. 'SELF' & 'CAR' CONCEPT COMPARISONS: THE WHITE GROUP

There was no significant difference in the average 'car' and 'self' concept ratings for white consumers ('car': 'self'=5.24:4.52), at the  $p \leq .01$ , or  $p \leq .05$  levels (Appendix D:4). More specifically, mean ratings differed significantly on items 2,3,6,7,8,9,15,21, namely, 'dull-exciting' ('car': 'self'=5.43:3.97;  $p \leq .05$ ), 'weak-strong' (6.00:4.08, with  $p \leq .001$ ), 'shy-bold' (5.43:4.13;  $p \leq .05$ ), 'old-young' (5.00:3.51;  $p \leq .01$ ), 'clumsy-nimble' (6.00:4.70;  $p \leq .01$ ), 'complex-simple' (4.71:3.24;  $p \leq .05$ ), 'plain-elegant' (5.00:3.08;  $p \leq .05$ ), and 'cramped-spacious' (5.71:4.54;  $p \leq .05$ ). On all items, the 'car' concept was given a higher mean rating.

2. 'SELF' & 'CAR' CONCEPT COMPARISONS: ASIAN ETHNIC GROUP

While there was no significant difference between mean ratings on the 'car' and 'self' concepts, for the Asian ethnic group ('car': 'self'=5.09:4.69), at the  $p \leq .001$  or  $p \leq .05$  levels, the difference was significant for  $p \leq .10$ ,

the average rating for the 'car' being higher than for the 'self' concept (Appendix D:5). Individual mean ratings differed on items 2,3,13,14,15,16,20, i.e., 'dull-exciting' ('car': 'self'=5.78:4.92;  $p \leq .05$ ); 'weak-strong' (5.64:4.71;  $p \leq .05$ ); 'fragile-robust' (5.86:4.76;  $p \leq .001$ ); 'slow-swift' (5.86:4.86;  $p \leq .01$ ); 'plain-elegant' (4.64:3.37;  $p \leq .05$ ); 'calm-lively' (5.43:4.08;  $p \leq .01$ ); 'masculine-feminine' (4.43:3.08;  $p \leq .05$ ). On all items, the 'car' concept was attributed a higher mean rating than the 'self' concept.

#### SOURCES OF INFORMATION IN ETHNIC AUTOMOBILE PURCHASING

Comparisons on sources of information relied on most for automobile purchasing, indicated that Asian ethnic car buyers relied significantly more on the 'friend' source (71 per cent), compared to 18 per cent white buyers, with  $X^2=33.9$ ,  $p \leq .001$ . The result was also significant in the case of West Indian ethnic buyers (43 per cent in comparison to 18 per cent in the white group, with  $X^2=39.1$ ,  $p \leq .001$ ).

The West Indian ethnic group made, moreover, greater use of 'personal experience', (43%:18%), as a mode of acquiring information on car choice ( $X^2=39.1$ ,  $p \leq .001$ ). In contrast, white buyers relied significantly more on the 'dealer' or commercially oriented market source (64%:14%), with  $X^2=15.3$ , and  $p \leq .001$ .



## DISTRIBUTION OUTLETS FOR ETHNIC AUTOMOBILE PURCHASING

Comparisons to test for differences in distribution outlet, and mode of transaction for car purchase, indicated that Asian ethnic purchases were significantly more informal transactions (15 per cent Asian compared to 3 per cent white, with  $X^2 = 4.55$ ,  $p < .05$ . A similar difference was observed, also, in the case of the West Indian ethnic group (14 per cent compared to 3 per cent), with  $X^2 = 11.85$ ,  $p < .001$ ).

## THE AUTOMOBILE PURCHASE DECISION

### AUTOMOBILE PURCHASE DECISION TIME

A comparison of differences in the time taken for information processing indicated that, while the greater proportion of decisions were within six to twelve months intervals, differences between the Asian, West Indian ethnic and white groups did not emerge as significant, the proportions being of the order, Asian:West Indian:White=75%:78%:79%.

### NUMBER OF MAKES CONSIDERED

The Asian ethnic group had a significantly higher proportion (76 per cent), of car owners who considered 'only one make' at the start of the decision process in comparison to the 31 per cent for the white group, with  $X^2 = 25.5$ ,  $p < .001$ . 'Open choice' decisions in the Asian ethnic group were also found

to be significantly more (18 per cent compared to 1 per cent white), with  $X^2=5.54$ ,  $p < .05$ ). Differences were not found significant for the West Indian ethnic group.

#### THE DECISION-MAKING PROCESS

The consumer groups were compared on the automobile purchase decision, to analyse for the involvement of reference groups and significant others in the decision process.

The evidence (Tables 6:6 and 6:7), indicated that car purchasing in the Asian ethnic segment was characterised, significantly, by the involvement of 'friends' and 'kin', as significant others in an informal decision process (93 per cent Asian as compared to 9 per cent white), with  $X^2=111.3$ ,  $p < .001$ ).

A similar emphasis on significant others emerged, in the sub-decision phases regarding 'car make' (96 per cent Asian compared to 8 per cent white),  $X^2=133.2$ ,  $p < .001$ , 'car model' (95 per cent Asian compared to 12 per cent white),  $X^2=113.8$ ,  $p < .001$ , 'car price' (34 per cent Asian compared to 3 per cent white),  $X^2=14.11$ ,  $p < .001$ , but not 'car colour', where the 'self' predominated in the case of the Asian ethnic group, (67%:9%),  $X^2=39.04$ ,  $p < .001$ . This was in distinct contrast to the predominantly 'joint' decision process for white automobile purchasing.

The West Indian ethnic group provided another contrast in claiming a significantly higher proportion of decisions entailing the 'self', to the exclusion of reference groups. Thus, there were more 'self' sub-decisions for 'car make' (71 per cent West Indian compared to 46 per cent white, with  $X^2=3.8$ ,  $p < .10$ ), 'car model' (64 per cent West Indian compared to 27 per cent white,  $X^2=7.37$ ,  $p < .01$ ), 'car colour' (71 per cent West Indian compared to 12 per cent white,  $X^2=13.8$ ,  $p < .001$ ), though not for 'car price' (78%:85%). The difference on the overall decision-process between West Indian and white groups was also found to be statistically significant, (57%:27%), with  $X^2=5.20$  and  $p < .05$ .

#### FUTURE CAR MARKET TRENDS

The car population in Britain is forecast to rise to 21.4 million in 1990, with a total of 25.1 million vehicles on the road, according to MAA/Department of Environment assessments. In summing up the prospects for the British motor industry, Motor Business, 1982 remarks:-

"The British motor industry is undergoing a process of considerable structural change... 1981 has been... a year characterised by dull domestic demand, dull conditions in the traditional export markets... However, it seems possible to identify a number of positive factors for the future... First, a new generation of attractive and relevant (i.e. fuel efficient) models is beginning to be produced in the UK's car factories. ...important contenders over the next couple of years being, notably, the revised Ford Cortina... It is clear therefore, that the ingredients of a 'product led recovery' for the British car industry are at last coming through..."

Estimating the success of British cars, Motor Business, 1983 further asserts:-

"British Leyland's Mini Metro serves notice on European and Japanese competitors that Britain is still capable of designing, developing and producing an attractively packaged car with novel features of relevance to today's needs... At the other end of the size scale, the Rolls Royce 'Silver Spirit range'... represents the pinnacle of automotive engineering..."

Given this perspective it is expected that UK car suppliers will be able to take a higher percentage of a 'declining domestic market'. The car market seems in fact, to be well launched on a modest revival, based especially on a recovery of the 'fleet' sector. The situation is assessed in Mintel's, 1978 reports:-  
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"Most fleet managers are prepared to buy British, provided there is reasonable availability... Aided by buoyant market conditions and the apparent willingness of the Japanese to restrict imports, British Leyland should start to benefit, along with Ford, from a higher level of new car sales for British manufacturers."

Despite these optimistic forecasts, it cannot be denied that importers have been gaining rapidly, both, in volume and market shares. Thus, Mintel, 1978 describes:-
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"... Even Ford UK, which has been gaining market share from the other British manufacturers, has still in fact been recording a volume decline because of the overall swing away from British cars..."

It is, of course, currently recognised that there are low

levels of productivity in the UK Ford plants, compared with their continental counterparts. The implementation of new working policies as well as installation of new production equipment aim, however, to achieve, or at least approach, Japanese levels of productivity by the mid-1980's. As Motor Business, 1982 remarks:-  
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".. The signs are encouraging, with heavy investments being directed... towards advanced production equipment... and new facilities aimed at achieving better product quality and changes in working practices, summarised as 'management being able to manage...' "

There are thus major challenges facing Ford in the short term, important among them being the fact that the best selling 'Cortina' would be progressively withdrawn and replaced by the Sierra (which was in the top ten in November 1982 estimates).

Considering Japanese trends, the period of rapid expansion of the Japanese motor industry now appears to be over. But as evidenced in the emphatic assertion in Motor Business, 1982 assessments:-

"The output of the two leading Japanese producers, Toyota and Nissan, fell during 1981, by 2.4% and 3.9% respectively. However, the output of noncountable KD kits increased in the same period by 33 per cent. Moreover, the effects of trade restraints on Japanese car imports are noticeable in the US and Canada but not in the UK."

To the extent that recent Business Monitor, 1982 statistics,

estimate the UK domestic car market at approximately £4,954 million, it could be considered that an estimated 2.9 per cent car owning segment of the 4 per cent ethnic consumer population in Britain, is worth a tentative £148 million in terms of market value.

Given such circumstances, it would not be surprising if car penetration of Japanese makes showed every possibility of increasing, with increasing ethnic car market size.

PART 2
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INFERENCES FROM ETHNIC AUTOMOBILE PURCHASING  
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SECTION 6:3
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ETHNIC AUTOMOBILE PURCHASING LEVELS  
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As evidenced in the findings on car purchasing in Section 6:2, it was estimated that a significantly higher proportion of Asian and West Indian ethnic car buyers were concentrated in the 24-34 yrs, and 35-44 yrs age groups and, also, in the 'D/E' blue collar categories, in comparison to the white group. The 25-34 yrs age group had a spread of 30 per cent Asian, 14 per cent West Indian, and 6 per cent white car owners, while the 35-44 yrs group had proportions of 48 per cent Asian, 50 per cent West Indian and 21 per cent white car owners. Moreover, the 'D/E' socioeconomic class was estimated as having incidences of 83 per cent Asian, 64 per cent West Indian and 39 per cent white car owners.

These findings are consistent with BMRB Target Group Index data (MGN Marketing Manual, 1979), according to which white car ownership varied by social class in the order, AB=85%, C1=71%, C2=64%, D=43% and E=19%, with an overall household car ownership level of 61 per cent, thus implying that levels of car ownership in the DE socioeconomic groups are evidently lower in the white, as compared to the Asian and West Indian

ethnic segments.

Along similar lines, Mintel, 1979 research on socioeconomic and age distributions within the car market found '.. little change in total car ownership other than a slight increase in the older and poorer sections of society..'.
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These results serve to emphasise the fact that the automobile industry is marketing to a conglomerate of social classes, rather than any single socioeconomic or income category. This was emphasised by Banks, 1979, in relation to automobile ownership:-  
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"Garages have failed to recognise the marked changes that have occurred in the types of customer with spending power. The once big spenders from the middle income bracket, are struggling with higher mortgages, higher transport costs and many other growing demands on their resources. The blue collar worker is now the man with the spending power, as a result of such factors as rented property, smaller mortgages and high wage increases..." (p.14)

Significantly, the evidence implies that the ethnic consumer groups are emerging as segments which, though localised in the younger age groups and blue collar categories, offer potential changes in the car marketing environment. They will therefore become a factor to be reckoned with, in future automobile promotion strategies.

SECTION 6:4 ~~~~~

AUTOMOBILE PRODUCT PENETRATION IN THE ETHNIC MARKET ~~~~~

A significantly higher incidence of automobile product penetration in terms of car ownership, was found to occur within the Asian ethnic segment (74 per cent), in comparison to the proportion for the white car owner market (38 per cent), with $X^2=34.4$, $p \leq .001$. However, the evidence also indicated a greater proportion of 'used car buyers' in the Asian ethnic car-owning segment, in contrast to more 'new car buyers' in the white segment. Thus, it was found that of all car owners in the Asian ethnic segment, 39 per cent were 'new car owners', and 61 per cent, 'used car owners'.

On a comparable level, the West Indian ethnic segment contained 22 per cent 'new car owners', and 78 per cent 'used car owners' ($X^2 = 11.36$, $p \leq .001$). Another important aspect of relevance to the 'past purchase experience' and knowledge in this product market, was the significantly higher proportion of 'first time car buyers' in the Asian (64 per cent), though not for the West Indian (36 per cent), ethnic group. In comparison, only 33 per cent white car owners were classified as 'first time buyers'.

It can be inferred, therefore, that car sales to the white consumer group, contribute largely to the maintenance of replacement levels within an established market. The high

proportion (67 per cent), of 'second time car buyers' in the white segment, substantiates existing data (Motor Transaction Survey, 1978; National Readership Survey, 1979); that within the white market, a high 91 per cent of 'new car purchases' are replacements of previously owned cars, while 75 per cent 'used car purchases', are also replacements of previous cars. The Asian and West Indian ethnic segments, in contrast, constitute an expanding market of first time car buyers of 'used cars'. Consistent with these findings, is the fact that sales of second-hand cars are recorded as having registered an increase from 2,189,000 in 1973, to 2,318,000 in 1977 (Motor Agents Association, 1978). The significantly larger size of the 'second hand ethnic car market', assumes additional relevance in the light of Mintel's, 1979 assessment of current and future car market trends:-

".. The second-hand car market is also recovering. It is of course a bigger annual market in terms of volume than new car sales, and provides the bread and butter business for most car dealers..."

In view of these facts, the heavy penetration into the Asian and West Indian ethnic groups, of the 'used car market', serves to bolster its importance and market value. Additionally, 'new car purchases' within these sub-markets were restricted mainly to 'second time car buyers', who had owned a car previously. Overall, however, these results substantiated previous research on the black American segment, which provides ample evidence of car purchasing as essentially symbolic of social status (Bauer, Cunningham

and Wortzel, 1965).

SECTION 6:5

AUTOMOBILE BRAND PENETRATION IN THE ETHNIC MARKET

A comparative analysis of automobile penetration by make, indicated that significantly higher proportions of the Asian and West Indian ethnic groups were, in each instance, owners of the 'Ford Cortina'. A breakdown of car penetration by make/brand among 'new' and 'used' car owners, further indicated that, within the Asian ethnic segment, a greater proportion of 'new car owners' also owned the Japanese 'Datsun' (Asian:White=86%:7%). Similar findings were not observed in the case of 'new car owners' for the West Indian ethnic group. A high proportion of imported cars owned in the white segment were found, in contrast, to be French makes, namely Skoda, Citroen and Peugeot.

The above evidence on automobile brand penetration, is substantiated by current trends in the UK car industry, which point to an increasing penetration of imported car makes, though the market is presently dominated mainly by Ford models. It is asserted, in fact, that the significant penetration of imported French cars within the white consumer segment, reflects the '...disillusionment among UK car buyers with British makes, so that 9 per cent of all new car sales every year, are recorded as being French models...'. French

cars in the UK market were also recorded in a dealer survey, (Market Research Great Britain, 1979), as being 'the most ~~~~~ admired, far preferred to their Japanese rivals, and ahead of their British and German products.'. Given these trends, they have obviously established an identity and popularity which will guarantee a stable market share, for some time to come. Japanese imports, primarily Nissan's 'Datsun' appear, in contrast, to have established themselves within a sizeable fraction of the 'new car buyer' group in the Asian ethnic market.

From the evidence it could be deduced that, although Ford models have acquired significant penetration levels within 'used car owner' ethnic markets and, are also the most popular make in the UK general market, there is no doubt that they are gradually losing out to imported, mainly French (EEC), models in the white market and, to Japanese models in the 'new car buyer' Asian ethnic segment, because of the economy and petrol consumption factors that feature prominently in car purchasing.

In fact, despite their declining importance (Motor Business, ~~~~~ 1982), Ford cars are, as yet, still the most popular models in circulation. It is possible, therefore, that the introduction of new and better Ford models might offset the brand erosion due to imported car makes.

In considering Asian ethnic Ford ownership, moreover, a vital

factor to be remembered is that Ford models have been essentially the domain of the 'fleet car' market. Thus, a British Institute of Management Survey, 1978, estimated that 70 percent of all 'new cars' were leased for company use. This 'biased orientation in favour of the fleet market in particular, is recorded in a Mintel, 1980 assessment of car penetration by make:-

"... the major car manufacturers are known to launch models expressly for the fleet market... As the Cortina became too grand for many company sales forces, so the Escort was upgraded in its place. The Leyland Marina is a classic example of a car purpose-built for the fleet market - solid, reliable, but fairly unsophisticated."

As in other consumer goods markets, car manufacturing companies have also depended on brand differentiation, and continuing programmes of successful car models. In describing the overall competition within the car market, Mintel, 1978 reports describe the situation as follows:-

"..Ford have held firmly on to the top two places on the leader board... The Ford 'Escort' and 'Cortina' have tended to increase their lead over all others... Leyland have taken a good grip of the middle section with the Mini, Maxi and Allegro... Finally, the Datsun Sunny may well be a sign of things to come, as far as imported models are concerned..."

Significantly, then, it can be seen that the greater penetration of Japanese car imports within the Asian ethnic segment, substantiates their reported success within the UK car market as a whole. According to Meadows, 1980, the

competitive edge attributed to Japanese, in comparison to Ford models, was due to their 'greater fuel efficiency, a price ceiling at the low end of the market...', and also, because of lower labour costs, which are half those of Fords, and fixed costs covering longer production runs, due to more standardised models..'. A trend in favour of Japanese models, was also evidenced in other national car markets, such as West Germany and North America, where car owners are reported to have 'turned away from big models, towards the Japanese fuel economy.' In explaining the 'thriving success' of Japanese cars in comparison to those produced by Fords, Meadows, 1980 elaborates:-

"Ford is seen to build eight car lines with seemingly endless permutations of body shapes and options. Adding complexity decreases standardisation, so that car quality would require a simple model (like the Japanese Datsun), rather than being a full line competitor with a range of models..." (p.86)

SECTION 6:6

INFORMATION PROCESSING OF AUTOMOBILE PRODUCT ATTRIBUTES

PHYSICAL ATTRIBUTES OF THE PRODUCT

Comparisons on Asian and West Indian ethnic and white ratings for product specific attributes, namely 'reliability', 'performance', 'product price', 'product reputation', 'recommendation of friends', and 'dealer importance',

indicated that the Asian ethnic group differed, in giving significantly lower mean importance ratings to 'product reliability', ($p < .10$), and higher mean ratings to 'recommendation of friends', ($p < .01$), as well as the importance attributed to 'dealers', ($p < .001$).

Differences between the Asian ethnic and white groups were not observed to be significant, for 'car performance', 'product reputation' or 'product price'. This evidence implies that within the Asian ethnic group, the extensive ownership levels of 'Ford' models among buyers of 'old cars', and 'Datsun' models among 'new car buyers', were primarily the result of the 'recommendation of friends' and 'dealer' influence dimensions, for cars rated similarly on other product attributes.

An important aspect in this context was, that 'recommendation' as a favourable attribute in the Asian ethnic market, could be considered secondary to the product reputation built up by Fords, for the 'Cortina' in particular (Banks, 1979), which has rarely moved from the top position in the UK market. This was summed up by Banks, 1979, who has described Fords as:-

"..the company trying hardest to give the consumer what he wants... namely cars that are reliable, better built, better looking, more advanced.. This is seen in the campaigns launched for Ford Cortina, which have stressed the importance of durability, reliability, and the engineering concept of 'built to last'..." (p.4)

Notably, the Ford product reputation has been advanced mainly through '...the image of advanced engineering, and launch advertisements making use of line drawings, in order to attract a market segment based on specific line attributes, and to project an image of informative advertising...'

(Banks, 1979). Consequently a stress on the product features
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of 'reliability' and 'performance' has been used, to give Ford models the competitive edge over other car makes. It would appear, therefore, that these aspects are indirectly promoted through retailer and reference group influence to a significant effect, in the Asian ethnic car buying segment.

In a similar vein, it can be inferred, that the significant penetration achieved within the Asian ethnic segment for Japanese 'Datsun' models was also promoted by reference groups and retailers, capitalising on its 'product reputation', built specifically on the 'quality', and 'additional features' aspects. In this context, Meadows,  
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1980, elaborates on the policy followed in the promotion of
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Japanese models:-

"The Japanese have built a reputation for quality, by producing a few basic car models with relatively few options and infrequent model changes. The less complex the assembly line, the more standardised the procedures, and the less likelihood of defects. Compared to this, Fords come in a number of variations, with a high level of dealer and customer complaints regarding car parts." (p.84)

An added measure used to enhance the 'product reputation' and



'performance' aspects of Nissan's Datsun models, is the strategic use of functional product 'features' as selling points which serve as a means of product differentiation within the car market, and allow, also, for the establishment of tangible brand image concepts.

The use of accessories as a selling point, has been advanced, especially, by Datsun manufacturers who provide a standard model with seven functional features, inclusive of '.. a radio, inertia seat belt, and a front head restraint - in addition to the five fitted accessories supplied in the Ford Cortina - an anti-mist panel, revolving lights, hazard warning lights, and cigar lighter' (Market Research Great Britain, 1979). Fitted accessories thus appear to have provided an obvious opportunity for segmenting ethnic car owners from the wider market, and thus promoting additional product sales.

The contrasting emphasis on 'product reliability' as foremost in importance within the white segment, is supported by Mintel's, 1978 consumer research on the key factors affecting car purchasing. Thus it was found that, while 'economy' as a product attribute, figured as the key factor in 1974, 'car reliability' emerged as the the main consumer requirement in a 1978 analysis, with 'accessories' rated as seventh on the importance list. However, in exploring the disadvantages of car attributes, it was further found that accessories/lack of accessories are, nevertheless, becoming an important feature

in recent years.

This expansion into the accessories market to segment car buyers, has been attributed to the '...urge to self expression or personalisation, for the way the enthusiast stamps his personality on the sameness of the mass produced vehicle..' (Market Research Great Britain, 1979; p.15). While earlier  
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considered part of the extravagant embellishments and performance aids for cars, accessories are now considered part of the 'basic consumer needs and, therefore fitted to varying degrees on manufacturers' models, thus serving to differentiate mass produced products. Their use in building up product reputation has, moreover, taken full advantage of product promotion through advertising strategies aimed at emphasising differentiating features which decrease the operational effort involved in product usage and convenience, so that automobiles typically have more, rather than less features advertised, depending on their skill and effort in operation, in appealing to accessory conscious market segments.

RECOMMENDATION OF FRIENDS ~~~~~

The Asian ethnic group was found, in the evidence, to give a significantly higher mean rating for 'recommendation of friends', as a desirable attribute. This has important implications for car marketing, in that the 'friend' source is essentially a 'non market' source, controlling Asian

ethnic car choices to a substantial degree and, one over which manufacturers have little or no control.

The importance of the 'recommendation' attribute in automobile choice within this segment, is substantiated by current evidence indicating the existence of the 'tightly knit social structure' for Asian ethnic groups (Desai, 1963; Tambs-Lyche, 1975; Rex, 1967; Lyon, 1973). The attribute assumes all the more significance for car purchasing, in view of the 'high-risk' connotations associated with automobiles, thus making the decision-process a seriously considered one. The importance given to the 'recommendation of friends' as an added dimension is significant, moreover, because of the implications associated with the Ford model, which has primarily been promoted as 'the family car for the common man', thus making it difficult for the 'Ford' appeal to broaden upmarket.

In accordance with this, Mintel, 1978 reports assess the situation:-

"..The question of 'model' or 'brand' is closely linked with the type of car or engine capacity... In the early 1960's, the small car was dominant. This was followed by a period of 'family' car dominance. The general economic gloom in 1973-74 led to a return of the small car. We are now seeing a return to the 'family' car provided it has a fairly small engine. A tremendous number of economy family models, not to mention the current fashion for every car to have at least five doors..."

This aspect was also described by Banks, 1979, as follows:-
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"... The Ford image is clearly one of mass production. A Ford is common in the sense that there are so many of them around... There is not so much of a social cachet attached to owning a Ford. And quite a few people take the view that they would rather not be seen in a Ford...." (p.4)

Under such circumstances, the need for social reassurance and recommendation could be taken to assume critical significance for the purpose of promoting Ford 'product images', in addition to protecting consumer 'self images'. This is obvious in the symbolism attached to car ownership, considered as it is, in the light of a social accessory declaiming a statement to the world, or attempting to project, as Banks, 1979 has aptly asserted, a '..personal self-image portrayed within a social or group context.'

#### AUTOMOBILE PRICING ~~~~~

While 'car price' as an attribute, did not differ in importance for the Asian ethnic and white groups, it was rated as significantly less important by the West Indian ethnic, in comparison to the white group. These findings highlight the fact that, car purchasing in the West Indian ethnic group is symbolic of 'status', rather than based on any 'price', 'reliability' or 'performance' requirements.

Previous research on the black American market, gives

substantial evidence of conflicting orientations to the 'price' attribute, among black consumers. Purchasing on a price basis was recorded for both, low-income and the high-income blacks across product categories ranging from low priced, frequently purchased food items, to high priced consumer durables such as automobiles (Evans, 1968; Feldman and Star, 1968, Sexton, 1972).

The desire for 'living better', and to buy increasingly expensive consumer products that reinforce prestige, is noted to be especially evident among middle class black consumers. Greater price consciousness within this subgroup, was explained, as described in Chapter 5 as well, to arise from the '..dilemma of whether to strive for middle class, white consumption values, or to enjoy and live more for the moment..' (Bauer, 1970), resulting in an attempt to attain both. Low importance ratings given to the 'price' attribute have also been found in product purchasing in a general context, among ethnic groups such as the Spanish speaking, Hispanic Americans (Green, 1971).

Yet another contrast to white importance ratings is observed in the price orientation of the Japanese-American ethnic groups, who were found to be significantly more price sensitive (Dalrymple, 1972), than white consumers. Given the motivational urges that pull blacks in both directions, the present findings on the low 'price' attribute ratings by the black group, were not surprising. In fact, within the

automobile category in particular, it was found in previous studies (Bullock, 1961), that blacks owned more higher priced automobiles than whites. Significantly higher ownership levels among blacks, of 'luxury oriented Cadillacs' in comparison to whites, were explained as 'an outlet for status aspirations, because of product visibility...' (Aker, 1968; Larson, 1973). However, as noted further by Howard, 1969, 'when all luxury cars are considered, it was found that blacks do not own more higher priced cars. Rather, the desire for prestige is tempered by purchasing what are considered as 'best buys', i.e., 'Fords and Chevrolets, rather than the luxury Cadillacs.' Ford and Chevrolets have thus been found to rank as the most popular purchases for both, black and white car owning segments in the US market.

Despite these findings, high price consciousness among the emerging affluent, black American middle class buyers, is given full support by Mingo, 1979:-

"The new middle class is concerned about the quality of life, and is increasingly aware of the value of those hard earned dollars, and is less likely to be brand loyal without some importance being given by the advertisers. The era of accountability, signals the end of the era of tokenism."

Evidence for the occurrence of different automobile brand perceptions between black and white consumer groups is also indicated in previous research (Bullock, 1961). It was thus found that differences in automobile perceptions occurred so

that, though Negro Ford car owners gave priorities to the same product qualities as white owners on automobile attributes, they differed in the proportion of each attribute giving the most desirable combination. More positive ratings were accorded by black Ford owners, on items such as 'easy to operate', and 'economical'. They were similar to white owners, however, in regarding Fords and Chevrolets as the 'best buys', because of low price ranges in comparison to the more prestige oriented cars such as Cadillacs and Buicks so that, as Bullock, 1961 categorically concluded:-  
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"There is no doubt as to the clear division on some products and some market qualities, between the two racial groups..." (p.104)

Taking into consideration these differing orientations on the importance of 'price' as a product attribute, the present evidence implies that, the Asian and West Indian ethnic groups diverge from each other as well as from the white car market, in their motivational differences related to car purchasing.

Eventually however, a similar case can be considered to apply for the three groups, in their attitudes toward the 'Ford Cortina' as the 'best buy' in terms of its product reputation and, UK market leadership in the past.

SECTION 6:7

CONGRUENCE OF ETHNIC 'SELF IMAGE' & AUTOMOBILE 'BRAND IMAGE' CONCEPTS

The Asian and West Indian ethnic and White consumers were compared on their self-concepts, in order to determine whether ethnic car owners had identifiable personality traits, distinguishing them from the white car owning market, and, whether these can be used to design separate and more efficient promotional messages. The ethnic and white groups were, in addition, tested in each instance for the degree of congruence between 'self' and 'brand' concepts. From the evidence, it was gathered that:-

1. A significant difference ($p < .05$), emerged in average self image ratings for Asian ethnic and white consumer groups. Thus, the Asian ethnic group gave itself higher mean ratings on 'sophisticated', 'exciting', 'strong', 'young', 'nimble' 'simple', 'calm' rather than 'lively', 'deliberate' and 'spacious', but rated itself lower for 'femininity'.
2. A significant difference also existed, for the average self image ratings for West Indian ethnic and white consumer groups ($p < .05$). Significantly, the West Indian ethnic group gave itself higher ratings on 'sophisticated', 'strong', 'sad', 'eccentric', 'simple',

'sporty', 'swift', 'indulgent', 'spacious', but lower on 'impulsiveness'.

3. There existed an essential element of congruency in the average 'car' and 'self' image concepts, for white car owners, with the difference being significant at a 10 per cent level. At a more specific level, the white group rated the car image as more 'exciting', 'strong', 'bold', 'young', 'nimble', 'simple', 'elegant' and 'spacious'.
4. A congruency was further observed between the average 'car' and 'self' images for Asian ethnic consumers, with the difference again significant at $p < .10$. Congruity between the 'self image' and 'car image' concepts was, therefore, considered to be relatively slight. Even so, the Asian ethnic group rated the car image as more 'exciting', 'strong', 'robust', 'swift', 'elegant', 'lively' and 'feminine'.

From these findings, it can be inferred that since self image concepts differ across both Asian and West Indian ethnic groups in comparison to white consumers, there would be differences in brand concepts for the same automobile, across these groups. This has implications for consumer marketing policies, in an evident need to design different promotional strategies for the same brand.

That self image differences do occur across different car ownership groups, is attested to in several research studies in a general marketing context. Thus, Tucker and Painter, 1976 identified personality differences in different car ownership groups, to the extent that Ford owners rated higher than Chevrolet owners, on personality traits representing 'responsibility', 'emotional stability', and also in acceptance to group norms, but not on 'ascendancy'. Again, Evans, 1968 found that there were differences in personality traits for Ford and Chevrolet owners, in that Ford owners rated higher on 'dominance' than Chevrolet owners and, also, that there did appear to be 'a modest association between owner personality and car image.. .' These results are substantiated by Westfall, 1962, who found that Ford car owners differed in temperament from Chevrolet owners, on ratings describing Ford owners as more 'active', 'vigorous', 'impulsive' and 'dominant' and, also, that Ford car owners showed a relation to Chevrolet owners, very similar to the relation of 'convertible' car owners, to 'standard' car owners.

On the basis of these several studies, it has been concluded (Grubb and Hupp, 1968), that the 'societal' self-image, the environment, and the 'individual' self image, are major influences in shaping automobile ownership and perception, so that any incongruity observed between automobile ratings and self-perceptions, could be attributed to a conflict between the 'individual' and 'societal' self images. In this

context, Brody and Cunningham, 1968 found an overlap in owner
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personality traits and car images, in only 40 per cent owners  
of Ford and Chevrolet automobiles. They have presented their  
argument conclusively, as stated below:-

"The effect of personality need variables is so slight, as to be valueless as a guide to practical action, so that the degree of car ownership that can be found in a set of data is limited only by the ingenuity and persistence of the statistician..." (p.51)

The previous studies on overlap between 'car' and 'self' image concepts as defined in terms of 'need' variables, cannot strictly be compared with this present study which used 'image', rather than 'need' variables. This was necessitated on the argument that, any formulation of ethnic promotional strategies would need to make allowances for the characteristic ambiguity that surrounds 'personality' as related to 'product image', arising as this does from the confused concept of personality itself, which has not been clearly defined in marketing studies.

The controversial stance has arisen from the confusion of considering the 'personality' concept as an 'image of the self', along with its simultaneous treatment in the form of 'personality traits that are an extension of the self' (Alderson, 1958). Irregular and contradictory findings in  
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consumer research data on automobile owner groups have therefore emerged, from marketers '...trying to relate personality needs, as isolated by the EPPS pencil and paper

personality tests rather than the self image, to the brand image that results from a perception of product attributes...'. The EPPS personality identification test has, therefore, been described subsequently as 'unsuitable for studying consumer behaviour' (Kassarjian, 1971), because it allows for the tendency in consumers to express their self concepts '...according to the priorities by which needs are to be satisfied in societal terms, rather than on individual terms..'.
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In this context, Horton, 1974, too, makes it clear that 'social desirability' is only one of the many types of response biases which might exist, and concludes that personality needs as defined by society, are of little use to consumer research, which typically requires an evaluation of self concepts, instead of social conformity.  
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Granting these ambiguities, the strength of the self-concept approach lies in the fact that it draws on two substantive phenomena, first, social interaction and, secondly, the expression of 'self image' rather than 'need' characteristics, so that product images would be considered a symbol of the interaction of the self with significant others, (Grubb and Grathwohl, 1967; Grubb and Hupp, 1968; Howard and Sheth, 1969; Grubb and Stern, 1971), where significant others are described as individuals whose evaluations of behaviour and attitude patterns are held in high esteem, and, therefore, used to obtain word-of-mouth
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information. In accordance with this viewpoint, Grubb, 1971  
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found that consumers of specific brands gave similar ratings
for the self image, as well as the image attributed to
significant others using the same car make, but different
ratings to the images attributed to consumers of competing
brands. The importance of significant others, as they affect
the brand 'image', is thus reflected on, by Grubb and Hupp,
~~~~~  
1968:-  
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".. The aspect that remains to be tested is the
relation of consumers' self concepts and their
product choice behaviour, to consumers' significant
references. It is through interaction with
significant others, that the self is maintained..."
(p.63)

The impact of the self image as it is shaped by environmental
and socio-cultural factors, and its effect on brand image
formation, was elaborated on, further, by Rogers, 1967:-
~~~~~

"The perception of the self is the result of the  
adaptive process. The way a person perceives a  
thing is a function of the environment and the  
beliefs, attitudes, value systems, and the cultural  
frame of reference.. In other words, perception has  
tended to be selective in nature. The criterion  
for selectivity serves further, as a frame of  
reference for brand choice."

Supporting this stance, Birdwell, 1968 found a high degree  
~~~~~  
of congruity between automobile perceptions and self images
for different car ownership groups, but also found that self-
identification was greatest among high priced 'prestige' car
owners (including the Buick, Cadillac and Pontiac), and,

least within the low-priced car ownership groups.

The relative lack of conceptual agreement for 'self' and 'car' images among low-priced car ownership groups was accounted for by their limited purchasing power, where car ownership becomes a function of income constraints, rather than defined merely by self image variables. Consequently, it can be expected that ownership of the same make, as in the case of the Ford Cortina, across Asian, West Indian ethnic and white consumer groups would, ultimately, be related to perceived car image differences, as they ensue from the societal norms within these groups.

Automobiles in particular, because they entail high promotional and advertising expenditures, have therefore been the subject of intensive personality and motivation research studies. The importance of psychological differences as they reflect brand choice, was thus emphasised in a review, by Frank, Massy and Lodahl, 1969:-

~~~~~

"The profit potential in relating marketing strategy to psychological differences is greater than is generally realised by marketers, who continue to dissipate competitive energy only on established notions of market segmentation (such as race, nationality, demography)..." (p.16)

From this discussion, and the findings of the study, it can be clearly argued, that ethnic images constitute a major element resulting in cross-cultural psychological

differences. The combination of ethnic cultural and psychological variables would, therefore, selectively serve to explain and account for major image differences existing for the same automobile brand.

#### SECTION 6:8

#### SOURCES OF INFORMATION IN ETHNIC AUTOMOBILE PURCHASING

A significantly higher proportion (71 per cent), of Asian ethnic car buyers claimed to obtain information from informal 'friend' sources within the social network, in comparison to 18 per cent white car buyers. At a comparative level, this difference was also significant though to a lesser degree ( $p < .10$ ), for the West Indian ethnic (43 per cent), group. Reference group influence and 'word of mouth' activity can, therefore, be considered important non-market influences, affecting car purchasing criteria within the Asian ethnic group.

An absence of similar word-of-mouth activity within the West Indian ethnic group, appears to have resulted in a more diffuse brand penetration pattern, essentially similar to that for white car owners.

An important aspect bearing on these divergent group orientations, is that informal sources become important in information search, as perceived risk of product purchase

increases. This is recognised especially in the case of car purchasing (Katz and Lazarsfeld, 1955; Warner, 1961; Cunningham, 1964; Arndt, 1967; Bauer, 1970). The limited use of commercial/market sources in car purchasing is also commented on, in Mintel, 1978 reports, as follows:-

"..With a relatively small number of in-company car buyers controlling 70 per cent of the market, there are many more effective ways of advertising than national consumer advertising. This is one reason why press and television advertising for cars, although substantial, is well under 1 per cent of sales compared with most consumer goods markets.. Even so, advertising expenditure has increased rapidly since 1974, with an increasing tendency to use television, though press remains the dominant medium.."

The influence of significant others, especially among ethnic linguistic cultural groups such as the Japanese-American and, Spanish-speaking Hispanic ethnic segments, obviously results from the greater emphasis on advice seeking from informal sources, and greater selectivity in information sources of high confidence value, concomitantly providing appropriate strategies for risk resolution.

The effectiveness of word of mouth recommendation with regard to product purchasing, was thus explained by Dichter, 1966, on the grounds that consumers seek informal sources of information due to impelling psychological motivational factors, as below:-

"It reduces the confusions of cold commercialism. This is more so when advertising is regarded as



more of a sales gimmick and tool than as an information source. The skepticism towards modern sales messages is accompanied by consumer attitudes which give word of mouth a good chance to operate... either through message involvement..., product involvement..., self involvement..., or other involvement, thus making products sell in an indirect way..." (p.147; 151)

At a comparable level, however, the West Indian ethnic and white groups made greater use of marketer dominated, commercial media. A possible explanation for this contrast is, that past purchase experiences arising from previous car ownership, being higher in the white group, resulted in product experience enabling white car buyers to make greater use of commercial sources which, when taken on their own, are known to have lower predictive confidence value (Bennett and Mandel, 1969).

Commercial sources would, therefore, be more useful to experienced car buyers, by adding to consumer confidence in product knowledge. This is consistent with the hierarchical model of buyer behaviour according to which, advertising for major consumer goods like automobiles, affects '...the intention to buy very little, product attitudes to a slight extent, and product knowledge the most....' (Lehman, 1977; Lavidge and Steiner, 1961; Howard and Sheth, 1969). Previous purchase experience is also postulated as reducing the need for information from informal sources for car purchasing in particular, and to result in a greater need for commercial market sources. The use of high-cost media sources such as consumer reports is, moreover, found to be related to

educational levels and consumer social classes (Westbrook and Fornell, 1970). Since Asian and West Indian ethnic car buyers were typically in the lower income groups and socioeconomic categories, this would at least partially explain their significantly greater personal information source usage, in comparison to the marketer dominated sources predominant for the white segment.

Lastly, however, given that buyers cannot consult or rely uniformly on all available sources of information, it is evident that within each of the three car owning segments, tradeoffs would be made in the usage and reliance of word of mouth on the one hand, and commercial sources on the other.

#### SECTION 6:9

#### ETHNIC AUTOMOBILE DECISION-MAKING

The ethnic decision-making structure was considered with regard to two major aspects, critical in their impact on the sub-decision phases relating to automobile purchase, namely:-

1. Number of Makes Considered in the Decision Process
2. The Decision-Making Process

#### NUMBER OF MAKES CONSIDERED IN DECISION PROCESS

A significant proportion of car purchase decisions in the

Asian ethnic group, had been found based on a consideration of only one choice (76 per cent), or, alternatively, left as open choices (18 percent). In contrast, a significant proportion of white consumer decisions (69 per cent), were based on evoked sets of two or three makes. The West Indian ethnic group was similar to the white group, in the high proportion (78 per cent), of decisions based on an evoked set of 2-3 makes.

It can be inferred from this, that since Asian ethnic purchasing was characterised by a high proportion (51%:6%), of overlapping 'Ford Cortina' choices, the small number of choices in the evoked set was due to normative pressure from salient reference groups within the ethnic social network, so that purchase decisions typically involved significant levels of word of mouth activity and opinion leadership, within the group. Previously conducted research on white consumers, indicates that normative influence does result in substantial selectivity in purchase decisions (Newman and Staelin, 1971). Another factor that can be considered as accounting for the overlapping choices and small number of makes involved, was that a high proportion of the Asian ethnic segment (64 percent), were 'first time car buyers' (Section 6:4).

In this context, consumer theory indicates that product purchase results in a learning process which influences subsequent purchasing behaviour (Engel, 1969; Howard & Sheth, 1968). Learning theory, however, can only provide a part

explanation for the greater proportion (76 per cent), of ethnic car buyers who claimed to have thought mainly of one make at the outset of the decision process.

The number of brands considered, therefore, appear to be reflective of the reference group identification process, existing within this group. Ample evidence of the normative influence of salient reference groups in shaping brand choices is provided by Bonnfield, 1970; Matthews, 1971; Wilson and Harvey, 1972; Minneard and Cohen, 1979; Ryan and Bonnfield, 1973; Fishbein, 1972. It is, moreover, especially likely to occur for socially conspicuous products as in automobile purchasing (Bourne, 1963; Cohen and Barban, 1970). In perspective, such relevance of 'sole' brand choices is particularly significant with regard to the Asian car market, in view of the increasing consumer size of this segment.

Notable in the context of ethnic group behaviour, word-of-mouth activity as an informative influence on product choices, was found to predominate in the Japanese-American groups (Dalrymple, 1972), as well as the Spanish-speaking Hispanic American groups (DeBellis, 1979), for purchases ranging from food items, to small appliances. As a dominant source of information, it is also indicated as important in a number of related marketing and public opinion studies, with regard to product diffusion and consumer preferences. Thus, word-of-mouth is evidenced to serve as an optimal rationalizing strategy (Wright, 1974), because it

'...restricts consumer attention to certain portions of product attributes, and excludes from consideration, the less relevant dimensions....'. Belk, 1974, additionally, gives evidence of 'word-of-mouth' activity enhancing group loyalty because of its trustworthiness, thus affecting aggregate product and brand preferences, 'when there are similarities in group norms and values..'. On this basis, reference group activity would serve as a 'situational variable' (Engel, 1969; Lavidge, 1971; Gunnar, 1971; Frank, 1972), in shaping product and brand preferences.

The tendency within the Asian ethnic segment, to use informal groups as frames of reference for product evaluation, draws further explanation from the increased stability of individual consumer evaluations (Arndt, 1967; Bauer, 1964; Rogers, 1962; Cox, 1967), as well as the 'motivation provided by coorientation of value perspectives', and 'consequent congruency of cultural group norms and belief structures...' (Festinger, 1964; Jones and Gerard, 1962; Sheth and Venkatesan, 1968; Engel, Moschis, Cocanaugher and Bruce, 1970). Granting this bias, it could be accepted that, the greater the credibility of group norms, the stronger would be individual motivations to reduce uncertainty and secure additional buying satisfaction, through personal sources of information (Katz and Lazarsfeld, 1967; Merton, 1969; King and Summers, 1971).

## THE DECISION-MAKING PROCESS

Differences in automobile decision-making were examined, in order to test for factors such as the importance given to 'significant others' in the purchase decision-process. By drawing on previous research on automobile purchasing (Morgan, 1976), the overall decision structure and sub-decision phases were analysed, by categorising them as 'self', 'joint household' or 'friends/neighbours'.

It was found that overall car purchase decision-processes within the Asian ethnic segment, resulted due to significant interpersonal communication with 'friends/neighbours' (93 per cent), in contrast to white consumer decisions which were significantly 'joint', (64 per cent), with  $p < .001$ . The informal 'friend' source also figured in Asian ethnic sub-decision phases concerning 'car make', 'car model/style', and 'car price', while the 'self' predominated in sub-decision choices relating to 'car colour', in contrast to more 'joint' decisions in the white ownership group.

The West Indian ethnic group offered yet another contrast, in the significant proportion (57 per cent), of decisions falling in the 'self' category, with no notable interaction with significant others ( $p < .05$ ). Within this latter group, the 'self' predominated, also, in sub-decision phases dealing with 'car make' (71 per cent), 'car model' (64 percent), and 'car colour' (71 per cent). However, differences between the

West Indian ethnic and white groups were not significant with regard to sub-decision choices relating to 'car price'. None the less, automobile purchase decisions for the West Indian ethnic group are significant in their implications of a much greater degree of unidimensionality existing within the group. It can be inferred that these latter purchase decisions are characterised by a higher degree of independence, more direct experience, and also more trial and error, in product choice.

The above differences in decision orientations, are subtle yet obvious in their implications. Within the white car-owning group, 'joint decision-making' implied an emphasis on the process whereby responsibility for product selection is spread out (Westbrook and Fornell, 1972), and therefore lowers the perceived cost of information search. Previous evidence on white automobile purchasing (Davis, 1972; Cunningham, 1974; Morgan, 1976), also provides ample support for the existence of 'joint decision' making as a process whereby information gathering is divided participants. However, the present study, as in previous research, gave evidence of substantial variability in the extent of 'joint involvement' in the sub-decision phases involved in automobile selection, i.e., those dealing with decisions on car-make, model/style, colour, and the budgetary decision regarding car price (Pollay, Brown and Burns, 1970, Troldahl and Holmes, 1971; Ahtola, 1976).

The automobile decision structure for the Asian ethnic group, gave evidence of tendencies to use less immediate reference groups as significant others, in product purchase. This implies that, Asian ethnic purchase decisions are a function of opinion leadership within the broader kin framework which allows extra-familial orientations to predominate (Desai, 1963; Lyon, 1972), in contrast to the 'joint-decision' structure of white car buyers.

Extrapolating from this decision structure, it could be argued that, since opinion leadership is essentially a two-way interpersonal communication process (King and Summers, 1970), rather than merely 'one-way communication' based on personal influence, the marketer can envisage Asian ethnic decision inventories as resulting from the processing of information accumulated from a number of significant others, rather than any single source of reference.

A comparative analysis of the sub-decision processes in the three consumer groups, indicated a greater degree of role and gender specialisation over the sub-decision phases for the Asian, as well as West Indian ethnic groups, in contrast to the ambiguity resulting from joint decision-making in the white group, which allowed for no role specialisation yet, predominantly male, car ownership. The decision-making framework for the Asian ethnic group, in contrast, provided leeway for significant impersonal interaction with opinion leaders, through the friend/kin networks. This phenomenon



effected a high degree of brand congruency, as indicated in the significant proportion, 51 per cent, of 'Ford Cortina' car owners, due to their similarity in purchase decisions. To the marketer, such decision-making patterns involving several significant others, provide the dual benefit of accelerating product acceptance within the ethnic markets, and simultaneously make for reductions in company promotional expenditures due to the greater salience of informal communication networks.

In perspective, the mode of decision-making in all three car owner groups can be considered, eventually, as based the 'principle of least effort' (Holmes and Lett, 1977). Thus, it can be argued that the decision-making structure differed in the Asian and West Indian ethnic and white groups to allow, typically, for social interaction patterns that are culturally and ethnically biased in favour of the least effort principle.

On this reasoning, it is possible to describe West Indian ethnic purchase decisions as involving a higher degree of objectivity, with greater use of high cost information and associated commercial media sources, as well as extended search. In contrast, Asian ethnic decision processes were distinctly subjective, with greater amounts of personal advice seeking. This could be considered to ensue, also, from differences in linguistic orientations, as well as the lack of familiarity with available information sources, and

hence lead to limited search through commercial market sources.

In this context, commercial and academic research studies (Engel, 1969), have investigated household involvement for automobile product purchasing over the stages of the buying process, as they have altered over the past two decades, between 1953-1973 (Cunningham, 1974). Compared to the role specialisation that characterised decision-making in 1953 (with sub-decisions relating to car make, price and purchase being primarily the domain of men, and those relating to car model/style, and car colour made mainly by women), there was a greater degree of 'joint' decision-making evidenced in 1973, along with greater 'merging of decision-roles'.

Alternative viewpoints (Giele, 1971), that have emerged, argue that as society becomes more complex, roles will become more specialised. This is because the increasing complexities of modern life require greater specialisation of task performance. Consequently task complexity itself, will make it necessary for many tasks to be performed by single household members, depending on the expertise required. A consideration of this perspective implies that, while the rate of change marking decision-making roles over the past two decades involved an acceleration towards egalitarianism in decision-making and product purchasing, whether or not the joint decision-making structures are evolutionary in any sense, is still subject to question. The dearth of empirical

research in the area as a whole, illustrates the lack of comprehension marking the purchasing behaviour of ethnic groups at the sub-market level, within the structure of the overall consumer market.

At a more conclusive level, it could be postulated that differences in decision-making styles characterising the Asian and West Indian ethnic and white buyer segments are ultimately a reflection and confirmation of the epistemological ethnic orientations, that result in different cognitive styles (Kluckhohn, Brim and Adorno, 1950), and provide the basis for different psychological sets of consumer attitudes, values and norms that make for role differentiation within their decision-making structures.

It can be concluded, therefore, that differences in the decision-making process would result in necessarily different promotional orientations and, selective targeting of ethnic groups, in order to maximally optimise on reaching cultural markets within the same geographical market area.

## SUMMARY AND CONCLUSIONS TO CHAPTER 6

This chapter investigated the Asian and West Indian ethnic segments within the UK car market, with a view to describing their marketing potential. The summary discussion below, runs through the major aspects discussed in the chapter.

1. The UK car market is a growing one, as represented by the increasing number of new vehicle registrations. New car sales were estimated in 1981, at approximately 2.6 million per year. While British car production has remained virtually constant in recent years at an annual 1.7-1.8 million, imports have been steadily rising in this far from saturated market, and accounted in 1981, for 44.1 per cent of car sales.

The major overseas competition is from the EEC, with France supplying one-third of Britain's imported cars (mainly Renault models), followed by Germany and, lately, Japan in the Far East. Japanese car imports, spearheaded by Nissan's 'Datsun', are now a growing force, seriously stepping up the competitive activity.

2. Significantly higher proportions of the Asian (74 per cent), and West Indian (33 per cent), ethnic groups were car owners, in comparison to 38 per cent in the white market. These estimates give every evidence that the ethnic car-owning segments are increasing at a faster

rate than the white segment, within the UK market. Additionally, significant proportions in all three consumer groups were male car owners. The demographic structure of the ethnic groups also indicated that they constituted a younger age market, largely in the D/E blue collar classes.

### 3. PRODUCT PENETRATION

Levels of 'new' and 'used' car ownership indicated that a significant proportion in the Asian (61 per cent), and also West Indian (78 per cent), ethnic groups were 'used car owners', in comparison to 21 per cent in the white group.

A significant proportion of car owners in the Asian (64 per cent), and West Indian (36 per cent), groups were also 'first time buyers', in contrast to 33 per cent in the white group.

### 4. BRAND PENETRATION

A significantly higher proportion of 'used car' owners in the Asian ethnic group owned the 'Ford Cortina', in comparison to the white consumer market (51%:6%). The difference was also significant though to a lesser degree, for the proportion of 'Ford Cortina' owners in the West Indian ethnic group (21%:6%).

Brand penetration levels indicated that a significant proportion of 'new car owners' in the Asian ethnic segment (86%) were 'Datsun' car owners. A similar difference also occurred in the penetration levels by car make, for the West Indian ethnic and white segments.

5. Asian and West Indian ethnic car owners differed significantly from the white segment, on 'self concept' ratings. Evidently, they constituted different psychographic and personality segments, in terms of car ownership.

Within each car ownership group, moreover, the 'self image' was essentially congruent with the automobile 'brand image'. Since self images differed significantly across groups, the results implied that ethnic cultural orientations lead to differences in Asian and West Indian ethnic and white image perceptions for the same car make.

#### 6. THE DECISION-MAKING STRUCTURE

A significant proportion of car owners in the Asian ethnic group made decisions on evoked sets of only one car make or, alternatively, on open-choice decisions. In contrast, car choices for the West Indian ethnic and white groups were based on evoked sets of 2-3 makes.

7. The automobile decision processes also differed. The Asian ethnic group made purchase decisions involving significant others, within a 'friend/kin' network. White car purchases in contrast, were significantly 'joint decisions' within the immediate household structure. The West Indian ethnic group offered yet another divergent framework, essentially constitutive of a 'self' decision process.

It can be conclusively stated that reference groups and word-of-mouth play an important part in all aspects of Asian ethnic car purchasing, from information seeking activity to the influence of retailers on source of purchase. Despite the theoretical interest in consumer information processing in general, its practical importance, especially in the ethnic consumer context, has been largely ignored. It is essential that this be considered in future marketing policies, for their impact on the design of efficient communication, distribution and merchandising strategies.

Overall, the findings implied that the Asian and West Indian ethnic groups do constitute distinct car owner segments, within the UK consumer market. Disproportionate penetration levels of specific car makes such as the 'Ford Cortina' and, subsequently, the 'Datsun', appeared to be heavily biased by purchase decision-processes involving informal 'friend' sources within the Asian ethnic social network, making for the penetration of several makes, rather than any single

make. The pattern of penetration by car make also indicated a changing trend in favour of Japanese makes within the 'new car owner' group, in the Asian ethnic segment. This implies a shift in the importance attributed to automobile product attributes, from those of 'reliability' known to mark the Ford range, to attributes of 'reliability', 'performance' and 'additional features' characterising the Japanese Datsun. It is thus obvious that the Asian and West Indian ethnic segments are contributing disproportionately in maintaining the 'Ford', as well as 'Datsun' shares within the UK car market.

In perspective, car penetration within the ethnic groups can be considered, at least in part, as due to the tendency to acquire status symbols. There is no doubt that car sales, particularly in the Asian ethnic segment are, additionally, targeted to a language and culture group, which prefers 'private car ownership' as an adjunct to its well-known 'incapsulation'. These sub-markets would, therefore, inevitably require selective targeting in order to be profitably reached.

The audience and readership characteristics of these segments are next examined in Chapter 7, in order to determine the feasibility of communicating with them, within a competitive media environment.



## CHAPTER 7

### ETHNIC MEDIA CONSUMPTION

#### INTRODUCTION

This chapter provides a comparative perspective on ethnic and white consumption patterns with regard to the media market. Consumer audiences were analysed for their preferential radio listening and television viewing patterns, as well as their readership of printed publications.

The aim was to obtain detailed and specific information on ethnic media usage, similar to that collated for the white oriented media market, in regular surveys representative of the Joint Industry Committee on National Readership Surveys (JICNARS), Television Audience Measurements (TAM), and Audits of Great Britain (AGB).

The 'uses and gratifications' approach was employed, similar to its adoption in mass communications research (Blumler and Katz, 1974), in order to highlight the major consumer policy areas concerning ethnic media usage, and the development of ethnic programme formats.

The need for ethnic programmes through the mass media, was brought to the fore in the Annan Report, 1977, on the future of broadcasting, as follows:-

"The continuing undercount and neglect of ethnic viewing remains the most serious barrier to the growth of ethnic media. This assumes added importance in view of the need for the broadcasting media to cater for the diversity of tastes and interests in a society which was always multilingual, and is certainly multicultural...."

A similar view was expressed in a UNESCO, 1974 report, which expounded the principles of media usage by minorities:-

"Minorities should have the opportunity to use the channels to obtain information, entertainment, education and cultural satisfaction..."

As broadcasting research increased in importance, consumer patterns have been explored for audience compositions relating to the different mass media, their differential preferences and, the variation in audience sizes with regard to specific media over time (Agostini, 1961; Broadbent, 1966; Copland, 1968; Ehrenberg, 1968; 1969; 1975). Despite enormous data collection on a continuous basis, the media exposure of ethnic consumers (Anwar, 1978), has been only narrowly examined and, requires more detailed investigation before any clear cut decision-areas on ethnic media can be formulated.

## SECTION 7:1 ~~~~~

### EMPIRICAL EVIDENCE ON ETHNIC MEDIA USAGE ~~~~~

Empirical evidence on the media usage of Asian and West Indian ethnic groups, in comparison to white audiences, is presented in Tables 7:1 to 7:6, in each instance.

The findings outlined below present a coverage of ethnic media consumption patterns, with regard to radio and television broadcasting as controlled by the BBC, as well as the commercially oriented Independent stations and, thirdly, on UK consumer publications in ethnic and non-ethnic language formats.

### ETHNIC RADIO LISTENING ~~~~~

The Asian and West Indian ethnic and white groups were analysed for listening patterns, with regard to:-

1. Radio listening frequencies, in days/week
2. Weights of radio listening, in average hours/week
3. Radio station penetration
4. Radio programme penetration

#### RADIO LISTENING FREQUENCIES

Estimates obtained on the radio listening of Asian and West Indian ethnic and white groups, for the 'number of days on average, that they listened to the radio per week', indicated that a significant proportion, 12 per cent, in the Asian ethnic group, claimed to 'never listen', in contrast to 5 per cent for the white group ( $X^2=4.56$ ;  $p < .05$ ). The proportion tuning in for 4-5 days per week, was also higher for the Asian ethnic, in comparison to the white group (45%:17%), at  $p < .001$ .

In contrast, a significantly higher proportion (74 per cent), of white listeners claimed to tune in to the radio, 6-7 days per week ( $p < .001$ ). On a comparable level, the West Indian ethnic group also had a greater proportion (55%:17%), of listeners in the 4-5 days/week category, compared to a high proportion of 'daily' listeners for the white group.

#### WEIGHTS OF RADIO LISTENING

The weight of radio listening was measured as the 'average number of radio listening hours per week'. Respondents in Asian and West Indian ethnic, and white consumer groups were classified by the system used in National Readership Surveys (JICNARS, 1979), into 'light', 'light-medium', 'medium', 'medium-heavy' and 'heavy' categories.

TABLE 7:1

## RADIO LISTENING IN THE ASIAN ETHNIC SEGMENT

	<u>WHITE</u>		<u>ASIAN</u>		<u>X<sup>2</sup></u>	<u>SIG.</u> <u>LEVEL</u>	<u>DIRECTION</u>
	(N=86)		(N=200)				
	<u>N</u>	<u>%</u>	<u>N</u>	<u>%</u>			
<u>RADIO LISTENING</u>							
<u>FREQUENCY</u>							
<u>(Days per week)</u>							
0 never	4	5	24	12	4.56	.05	ASIAN
1-3 days/week	3	4	24	5	0.76	NS	-
4-5 days/week	15	17	90	45	20.86	.001	ASIAN
6-7 days/week	64	74	76	38	30.47	.001	WHITE
	N=86	[100]	N=200	[100]			
<u>WEIGHT OF RADIO</u>							
<u>LISTENING</u>							
<u>(Hours per week)</u>							
<u>LIGHT</u>							
(up to 1.49 hrs)	1	1	32	16	14.46	.001	ASIAN
<u>LIGHT MEDIUM</u>							
(1.50-3.49 hrs)	3	4	44	22	16.38	.001	ASIAN
<u>MEDIUM</u>							
(3.50-7.49 hrs)	42	49	96	48	0.004	NS	-
<u>MEDIUM-HEAVY</u>							
(7.50-16.49 hrs)	33	38	27	14	0.07	NS	-
<u>HEAVY</u>							
(16.50+ hrs)	7	8	1	-	10.25	.01	WHITE
	N=86	[100]	N=200	[100]			
<u>AVERAGE RADIO HRS</u>	-	9.71	-	7.20	-	-	-
<u>RADIO STATION</u>							
<u>PENETRATION</u>							
RADIO 1	23	27	3	1	27.40	.001	WHITE
RADIO 2	20	23	24	12	0.71	NS	-
RADIO 3	3	4	1	-	0.98	NS	-
RADIO 4	23	27	4	2	24.80	.001	WHITE
INDEPENDENT (BRMB)	51	59	94	47	1.51	NS	-
	N=86	[100]	N=200	[100]			
<u>RADIO PROGRAMME</u>							
<u>PENETRATION</u>							
POP	19	22	14	7	5.09	.05	WHITE
LIGHT	41	48	6	3	53.71	.001	WHITE
CLASSICAL	7	8	1	-	6.53	.05	WHITE
DRAMA	9	10	1	-	9.68	.05	WHITE
QUIZ	5	6	1	-	3.56	.10	WHITE
COMEDY	6	7	5	3	0.71	NS	-
NEWS/CURRENT							
AFFAIRS	45	52	24	12	24.34	.001	ASIAN
ETHNIC SPECIALS	-	-	164	82	135.40	.001	ASIAN
	N=132	[100]	N=216	[107]			

\* PERCENTAGES DO NOT ALWAYS ADD UP TO [100] BECAUSE OF  
MULTIPLE CLAIMS

TABLE 7:2

## RADIO LISTENING IN THE WEST INDIAN ETHNIC GROUP

	<u>WHITE</u> (N=86)		<u>WEST INDIAN</u> (N=22)		<u>X<sup>2</sup></u>	<u>SIG. LEVEL</u>	<u>DIRECTION</u>
	<u>N</u>	<u>%</u>	<u>N</u>	<u>%</u>			
<u>RADIO LISTENING FREQUENCY</u> (Days per week)							
0 (Never)	4	5	1	5	0.30	NS	-
1-3 days/week	3	4	1	5	0.76	NS	-
4-5 days/week	15	17	12	55	14.91	.001	WEST INDIAN
6-7 days/week	64	74	8	35	10.71	.01	WHITE
	N=86	[100]	N=22	[100]			
<u>WEIGHT OF RADIO LISTENING</u>							
LIGHT (up to 1.49 hrs)	1	1	1	5	5.22	.05	WEST INDIAN
LIGHT-MEDIUM 1.50-3.59 hrs	3	4	1	5	0.75	NS	-
MEDIUM (3.50-7.49 hrs)	42	49	11	50	0.11	NS	-
MEDIUM-HEAVY (7.50-16.49 hrs)	33	38	8	38	0.006	NS	-
HEAVY (16.50+ hrs)	7	8	1	5	0.014	NS	-
	N=86	[100]	N=22	[100]			
AVERAGE RADIO HRS		9.71	-	9.80	-	-	-
<u>RADIO STATION PENETRATION</u>							
RADIO 1	23	27	5	23	0.54	NS	-
RADIO 2	20	23	5	23	0.13	NS	-
RADIO 3	3	4	1	5	0.33	NS	-
RADIO 4	23	27	3	14	2.22	NS	-
INDEPENDENT (BRMB)	51	59	14	64	0.45	NS	-
	N=120	[149]	N=43	[197]			
<u>RADIO PROGRAMME PENETRATION</u>							
POP	19	22	6	27	0.23	NS	-
LIGHT	41	48	11	50	0.003	NS	-
CLASSICAL	7	8	1	5	0.06	NS	-
DRAMA	7	8	1	5	0.06	NS	-
QUIZ	5	6	1	5	0.248	NS	-
COMEDY	6	7	5	23	5.18	.05	WEST INDIAN
AFFAIRS	45	52	12	55	0.009	NS	-
ETHNIC SPECIALS	-	-	-	-	-	NS	-
	N=132	[153]	N=38	[174]			

\* PERCENTAGES DO NOT ALWAYS ADD UP TO [100] BECAUSE OF  
MULTIPLE CLAIMS

TABLE 7:3

## TELEVISION VIEWING IN THE ASIAN ETHNIC GROUP

	<u>WHITE</u>		<u>ASIAN</u>		<u>X<sup>2</sup></u>	<u>SIG. LEVEL</u>	<u>DIRECTION</u>
	<u>N</u>	<u>%</u>	<u>N</u>	<u>%</u>			
<u>TELEVISION VIEWING FREQUENCY</u> (Days per week)							
1-3 days/week	1	1	6	3	1.79	NS	-
4-5 days per week	2	2	24	12	7.56	.01	ASIAN
6-7 days/week	83	97	170	85	6.72	.01	WHITE
	N=86	[100]	N=200	[100]			
<u>WEIGHT OF TELEVISION VIEWING</u>							
<u>LIGHT</u>							
0-3.5 hrs/week	2	2	1	0.5	0.57	NS	-
<u>MEDIUM</u>							
3.50-7.49 hrs/week	5	6	3	1.5	2.68	NS	-
<u>MEDIUM-HEAVY</u>							
7.50-16.49 hrs/wk	4	5	12	6	0.54	NS	-
<u>HEAVY</u>							
16.50+ hrs	75	67	184	93	10.38	.001	ASIAN
	N=86	[100]	N=200	[100]			
<u>AVERAGE HOURS VIEWED</u>							
	-	25	-	26	-	-	-
<u>ITV LOYALTY</u>							
Less than 4 hrs out of 10 hrs	3	4	52	26	12.83	.001	ASIAN
4-6 hrs out of every 10 hrs	39	45	90	45	0.06	NS	-
Over 6 hrs out of 10 hrs	40	46	58	29	7.42	.01	WHITE
	N=86	[100]	N=200	[100]			
<u>TV CHANNEL PENETRATION</u>							
BBC 1	4	5	4	2	1.11	NS	-
BBC 2	34	40	100	50	0.92	NS	-
ITV	79	92	196	98	0.11	NS	-
	N=117	[137]	N=300	[150]			
<u>TV PROGRAMME PENETRATION</u>							
SERIALS	27	31	6	3	67.63	.001	WHITE
COMEDY	8	9	18	9	0.58	.01	-
SPORT	4	5	10	5	0.004	NS	-
ADVENTURE	4	5	8	4	0.28	NS	-
PLAYS	8	9	6	3	7.32	.01	WHITE
FILMS	8	9	6	3	7.84	.01	WHITE
VARIETY	10	12	40	20	4.46	.01	ASIAN
CURRENT AFFAIRS	25	29	24	12	23.50	.001	WHITE
SPECIAL ETHNIC PROGRAMMES	-	-	194	97	108.60	.001	ASIAN
	N=82	[109]	N=132	[156]			

\* PERCENTAGES DO NOT ALWAYS ADD UP TO [100] BECAUSE OF MULTIPLE CLAIMS

TABLE 7:4

## TELEVISION VIEWING IN THE WEST INDIAN ETHNIC GROUP

	<u>WHITE</u>		<u>WEST INDIAN</u>		<u>X<sup>2</sup></u>	<u>SIG. LEVEL</u>	<u>DIRECTION</u>
	(N=86)		(N=22)				
	<u>N</u>	<u>%</u>	<u>N</u>	<u>%</u>			
<u>TELEVISION VIEWING FREQUENCY</u> (Days per week)							
1-3 days/week	1	1	1	5	3.75	.10	WEST INDIAN
4-5 days/week	2	2	2	9	4.54	.05	WEST INDIAN
6-7 days/week	83	97	19	86	1.77	NS	-
	N=86	[100]	N=22	[100]			
<u>WEIGHT OF TELEVISION VIEWING</u> (Hours per week)							
<u>LIGHT</u>							
0-3.49 hrs/week	5	6	1	5	0.08	NS	-
<u>MEDIUM</u> (3.50-7.49)							
	2	2	1	5	2.97	NS	-
<u>MEDIUM-HEAVY</u> (7.49-16.50 hrs/wk)							
	4	5	3	14	4.05	.05	WEST INDIAN
<u>HEAVY</u> over 16.50 hrs/wk							
	75	67	17	76	0.69	NS	-
	N=86	[100]	N=22	[100]			
<u>AVERAGE TV HOURS</u>	-	25	-	22	-	-	-
<u>ITV (COMMERCIAL) PENETRATION</u>							
<u>Less than 4 hrs out of 10 hrs</u>							
	7	4	1	5	0.014	NS	-
<u>4-6 hrs out of 10</u>	39	45	15	68	4.62	.05	WEST INDIAN
<u>Over 6 hrs out of 10 hrs</u>							
	40	46	6	27	1.92	NS	-
	N=86	[100]	[100]				
<u>TV CHANNEL PENETRATION</u>							
<u>BBC 1</u>	4	5	1	5	0.29	NS	-
<u>BBC 2</u>	34	40	8	35	0.04	NS	-
<u>INDEPENDENT (ITV)</u>	79	92	21	95	0.23	NS	-
	N=86	[100]	N=22	[100]			
<u>TV PROGRAMME PENETRATION</u>							
<u>SERIALS</u>	27	31	5	23	7.94	.01	WHITE
<u>COMEDY</u>	8	9	2	9	0.79	NS	-
<u>SPORT</u>	4	5	1	5	0.15	NS	-
<u>ADVENTURE</u>	4	5	1	5	0.13	NS	-
<u>PLAYS</u>	8	9	7	32	0.97	NS	-
<u>FILMS</u>	8	9	7	32	0.97	NS	-
<u>VARIETY</u>	10	12	18	82	11.54	.001	WEST INDIAN
<u>NEWS/CURRENT AFFAIRS</u>	25	29	16	73	0.09	NS	-
<u>SPECIAL ETHNIC</u>	-	-	-	-	-	NS	-
	N=92	[109]	N=57	[261]			

\* PERCENTAGES DO NOT ALWAYS ADD UP TO [100] DUE TO MULTIPLE CLAIMS



TABLE 7:5

## READERSHIP OF PUBLICATIONS IN THE ASIAN ETHNIC GROUP

	TOTAL UK CIRCULATION (ABC FIGURES)	WHITE (N=86)		ASIAN (N=200)		X <sup>2</sup>	SIG. LEVEL	DIRECTION
		N	%	N	%			
<u>DAILY PUBLICATIONS</u>								
<u>BIRMINGHAM EVENING</u>								
MAIL	344,957	67	79	72	36	40.60	.001	WHITE
THE SUN	3,805,575	7	8	4	2	4.58	.05	WHITE
DAILY MIRROR	3,616,699	15	17	4	2	20.69	.001	WHITE
DAILY EXPRESS	2,405,638	2	2	8	4	1.11	NS	-
DAILY MAIL	1,946,058	5	6	4	2	1.75	NS	-
DAILY TELEGRAPH	1,493,827	8	9	4	2	6.26	.05	WHITE
THE GUARDIAN	388,304	4	5	12	6	2.71	NS	-
FINANCIAL TIMES	204,608	2	2	12	6	2.71	NS	-
DAILY JANG (ETHNIC)	100,000	-	-	52	26	26.24	.001	ASIAN
DAILY MILLAT (ETHNIC)	-	-	-	26	13	7.82	.01	ASIAN
<u>SUNDAY</u>								
<u>PUBLICATIONS</u>								
NEWS OF THE WORLD	4,642,585	19	22	2	1	36.28	.001	WHITE
SUNDAY MIRROR	3,870,974	25	29	5	3	42.43	.001	WHITE
SUNDAY EXPRESS	3,231,734	2	2	1	-	0.57	NS	-
THE OBSERVER	1,162,980	6	7	4	2	2.97	NS	-
SUNDAY TELEGRAPH	1,267,336	3	4	20	10	4.38	.05	ASIAN
SUNDAY TIMES	-	2	2	6	3	0.51	NS	-
<u>WEEKLY/BIWEEKLY</u>								
<u>PUBLICATIONS</u>								
TV TIMES	-	15	17	46	23	1.46	NS	-
RADIO TIMES	3,644,969	6	7	26	13	2.84	NS	-
WOMAN'S OWN	1,563,807	13	15	5	3	14.16	.001	WHITE
WOMAN	1,499,973	21	25	2	1	15.13	.001	WHITE
WOMAN'S WEEKLY	1,487,406	4	5	1	1	2.33	NS	-
WOMAN'S REALM	775,386	3	4	1	0	2.02	NS	-
PUNJAB TIMES	-	-	-	9	5	3.09	.10	ASIAN
DES PERDES (ETHNIC WEEKLY)	-	-	-	9	5	3.09	.10	ASIAN
AKHBAR-E-WATAN (ETHNIC WEEKLY)	-	-	-	14	7	5.38	.05	ASIAN
<u>MONTHLY</u>								
<u>PUBLICATIONS</u>								
COSMOPOLITAN	475,306	2	2	1	5	1.67	NS	-
GOOD HOUSEKEEPING	371,493	5	6	6	3	0.48	NS	-
WOMAN'S JOURNAL	227,796	4	5	-	-	0.57	NS	-
READER'S DIGEST	-	4	5	1	0	5.89	.05	WHITE
VOGUE	105,853	5	6	1	-	5.89	.05	WHITE
GARAVI GUJARAT (ETHNIC)	UNCERT	-	-	10	5	3.54	.10	ASIAN

TABLE 7:6

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 READERSHIP OF PUBLICATIONS
 ~~~~~  
 IN THE WEST INDIAN ETHNIC GROUP  
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| | TOTAL UK
CIRCULATION
(ABC FIGURES) | WHITE
(N=86) | | WEST
INDIAN
(N=22) | | X ² | SIG.
LEVEL | DIRECTION |
|---------------------------|--|-----------------|----|--------------------------|----|----------------|---------------|-------------|
| | | N | % | N | % | | | |
| <u>DAILY PUBLICATIONS</u> | | | | | | | | |
| <u>BIRMINGHAM EVENING</u> | | | | | | | | |
| MAIL | 344,957 | 67 | 79 | 19 | 86 | 1.38 | NS | - |
| THE SUN | 3,805,575 | 7 | 8 | 5 | 23 | 5.39 | .05 | WEST INDIAN |
| DAILY MIRROR | 3,616,099 | 15 | 17 | 6 | 27 | 1.79 | NS | - |
| DAILY EXPRESS | 2,405,638 | 2 | 2 | 1 | 5 | 1.67 | NS | - |
| DAILY MAIL | 1,946,058 | 5 | 6 | 1 | 5 | 0.08 | NS | - |
| DAILY TELEGRAPH | 1,493,827 | 8 | 9 | 2 | 9 | 0.14 | NS | - |
| THE GUARDIAN | 388,304 | 4 | 5 | 1 | 5 | 0.31 | NS | - |
| FINANCIAL TIMES | 204,608 | 3 | 2 | 1 | 5 | 0.76 | NS | - |
| <u>SUNDAY</u> | | | | | | | | |
| <u>PUBLICATIONS</u> | | | | | | | | |
| NEWS OF THE WORLD | 4,642,585 | 19 | 22 | 11 | 50 | 8.26 | .01 | WEST INDIAN |
| SUNDAY MIRROR | 3,870,974 | 25 | 29 | 3 | 14 | 3.01 | NS | - |
| SUNDAY EXPRESS | 3,231,734 | 3 | 2 | 1 | 5 | 0.76 | NS | - |
| THE OBSERVER | 1,162,980 | 6 | 7 | 1 | 5 | 0.06 | NS | - |
| SUNDAY TIMES | - | 2 | 2 | 0 | 0 | 1.67 | NS | - |
| DAILY TELEGRAPH | 1,267,336 | 3 | 4 | 2 | 9 | 2.83 | NS | - |
| <u>WEEKLY/BIWEEKLY</u> | | | | | | | | |
| <u>PUBLICATIONS</u> | | | | | | | | |
| TV TIMES | - | 15 | 17 | 1 | 5 | 1.40 | NS | - |
| RADIO TIMES | 3,644,969 | 6 | 7 | 2 | 9 | 0.63 | NS | - |
| WOMAN'S OWN | 1,563,807 | 13 | 13 | 15 | 2 | 0.06 | NS | - |
| WOMAN | 1,499,973 | 21 | 25 | 4 | 18 | 0.11 | NS | - |
| WOMAN'S WEEKLY | 1,487,406 | 4 | 5 | 2 | 9 | 1.78 | NS | - |
| WOMAN'S REALM | 775,386 | 3 | 4 | 1 | 5 | 0.76 | NS | - |
| <u>MONTHLY</u> | | | | | | | | |
| <u>PUBLICATIONS</u> | | | | | | | | |
| WOMAN & HOME | 669,725 | 2 | 2 | 1 | 5 | 1.67 | NS | - |
| COSMOPOLITAN | 475,306 | 2 | 2 | 1 | 5 | 1.67 | NS | - |
| GOOD HOUSEKEEPING | 371,493 | 5 | 6 | 1 | 5 | 0.08 | NS | - |
| WOMAN'S JOURNAL | 227,796 | 4 | 5 | 0 | 0 | 0.28 | NS | - |
| READER'S DIGEST | - | 4 | 5 | 0 | 0 | 0.28 | NS | - |
| VOGUE | 105,853 | 5 | 6 | 5 | 23 | 8.14 | .01 | WEST INDIAN |
| ROOT | - | - | - | 1 | 5 | 0.64 | NS | - |
| EBONY | - | - | - | 2 | 9 | 1.67 | NS | - |

The evidence indicated that the Asian ethnic group averaged 7.20 hours per week of radio listening, in comparison to the white average of 9.71 hours per week. The West Indian ethnic group averaged 9.8 hours per week, slightly more than the white average.

The data indicated that a significantly higher proportion in the Asian ethnic group (38 per cent), were 'light' to 'light-medium' listeners, in comparison to 5 per cent white consumers ($p \leq .001$).

The proportion of 'light' listeners in the West Indian ethnic group (5 per cent), was also higher than observed for the white group (1 per cent), with $p \leq .01$.

However, the proportions of 'medium' to 'medium-heavy' listeners were not significantly different, for either the Asian or West Indian ethnic groups, in comparison to the white group.

RADIO STATION PENETRATION

The three listener groups were identified according to the 'station listened to most, in an average week'. The evidence indicated that consistently higher proportions in the Asian (47 per cent), and West Indian (64 per cent), ethnic groups, as well as the white group (59 per cent), claimed to listen most heavily to 'Independent' radio programmes.

Proportions in the Asian ethnic group were significantly lower for listener categories pertaining to the nationally oriented, BBC Radio 1 (Asian:White=1%:27%), and BBC Radio 4 (2%:27%), stations, with $p < .001$, in each case. In contrast, differences were not significant for the West Indian ethnic and white groups, with regard to any of the BBC oriented radio stations.

RADIO PROGRAMME PENETRATION

The Asian, West Indian ethnic and white groups were classified, according to the 'type of radio programme' listened to most. The Asian ethnic group was found characterised by a high level (82 per cent), of penetration for the 'special ethnic programmes', coupled with very little penetration for the general, white-oriented programmes ($p < .001$). White audience penetrations were consistently higher for other programme categories, with Asian ethnic:White audience ratings, of the order 'pop'=7%:22%, 'light'=3%:48%, 'classical'=0%:8%, 'drama'=0%:10%, 'quiz'=0%:6%, 'news and current affairs'=12%:52%. Differences were not significant in the case of 'comedy' programme listening (3%:7%).

In contrast, differences between West Indian ethnic and white groups were not found significant except for the 'comedy' programme category, where a higher proportion of West Indian ethnic listeners (West Indian ethnic:White=23%:7%), was found to prevail.

ETHNIC TELEVISION VIEWING

Television viewing was examined, for ethnic and white differences on the following topics:-

1. Television viewing frequencies, in days per week
2. Weights of television viewing, in hours per day
3. Penetration by television channel
4. Penetration by programme type

TELEVISION VIEWING FREQUENCIES

Television viewing frequencies were estimated in terms of 'days per week', for each of the three consumer groups. A significantly higher proportion in the Asian ethnic group (Asian:White=12%:2%), claimed to view television 4-5 days per week. In contrast, a significantly higher proportion in the white group were regular viewers (5 or more days/week), with $\chi^2=6.72$, $p < .01$).

The West Indian ethnic group also had a higher proportion who claimed to view television 4-5 days per week (West Indian:White=9%:2%), at $p < .05$, though differences in the proportions of West Indian ethnic and white viewers were not significant for the higher (5 or more days/week), frequencies. Despite these differences, it was evident that, the Asian and West Indian ethnic groups had significantly higher proportions who viewed television on a daily basis.

WEIGHTS OF TELEVISION VIEWING

Ethnic and white respondents were examined, for the 'average hours of TV viewed per week'. The findings gave evidence of the fact that, there were no significant differences in terms of the hours of television viewed, for the Asian ethnic (26 hours per week), and white (25 hours per week), groups on the one hand, and the West Indian ethnic (22 hours per week), and white groups on the other.

With regard to individual categories, however, a significantly higher proportion of 'heavy' viewers was found for the Asian ethnic group (92%:67%), with $X^2=10.38$, $p < .01$. In contrast, the West Indian ethnic group contained a greater proportion of 'medium-heavy' viewers (West Indian:White=14%:5%), with $p < .05$.

TV CHANNEL PENETRATION

An analysis of TV channel penetration indicated that differences in Asian ethnic and white groups, were not statistically significant for the proportions claiming to regularly view either the BBC 1 (Asian:White=2%:5%), BBC 2 (50%:40%), or independent, ITV (98%:92%) channels. Levels of channel penetration were, again, not significantly different for the West Indian ethnic and white groups, for BBC1 (West Indian:White=5%:5%), BBC2 (35%:40%), or ITV (95%:92%).

In terms of ITV channel penetration however, the findings gave evidence of significantly lower levels of channel loyalty in the case of both, Asian and West Indian ethnic groups, in comparison to the white group. Thus, a greater proportion of the Asian ethnic group (36%:4%), claimed ITV viewership for 'less than 4 hours out of every 10 hours', with $X^2=12.83$, $p < .001$. Again, a greater proportion in the West Indian ethnic group claimed to view ITV for '4-6 hours out of every 10 hours' (68%:45%), $X^2 = 4.62$, $p < .05$. Evidently, the tendency for channel switching was more marked, especially in the case of the Asian ethnic group.

TV PROGRAMME PENETRATION

An analysis by 'type of TV programme' viewed most, using the method of aided recall to increase consumer response rates, indicated a significant penetration of the special, BBC oriented ethnic television programmes, for the Asian ethnic group (97 per cent), with $X^2 = 108.6$; $p < .001$. Differences with regard to white-oriented programmes were not significant except for the 'variety' programme category, which was evidenced to have a significantly higher penetration within the Asian ethnic, in comparison to the white group (Asian:White=20%:12%), with $p < .01$.

On a comparable level, TV programme penetration for the West Indian ethnic and white groups, gave evidence of higher audience ratings for 'serial' viewing in the white group (31

percent), in comparison to 23 per cent for the West Indian ethnic group ($X^2=7.94$; $p < .01$). Additionally, the 'variety' programme category, as for the Asian ethnic group, also had a higher penetration within the West Indian ethnic group (West Indian:White=82%:12%); $X^2=11.54$; $p < .001$.

ETHNIC MEDIA READERSHIP

The Asian and West Indian ethnic, and white groups were comparatively analysed for readership levels of major consumer publications, as discussed below.

READERSHIP OF DAILY PUBLICATIONS

The most popular daily in the white consumer market, evidenced to be the locally oriented 'Birmingham Evening Mail', with 79 per cent white readers, also had the highest penetration in the Asian (36 per cent readers), and West Indian (86 per cent), ethnic groups. In addition, readership levels within the Asian ethnic group were significant for the 'Urdu' language ethnic dailies, 'The Daily Jang' (26 per cent), and 'Daily Millat' (13 per cent). The latter two ethnic dailies together had a readership equalling the penetration of the 'Birmingham Evening Mail' (36 per cent), within the Asian ethnic group.

In comparison, differences were not significant for readership levels of either the 'morning', or 'evening'

dailies, in the West Indian ethnic and white groups.

READERSHIP OF SUNDAY PUBLICATIONS

Evidence on readership patterns for the Sunday newspapers, given in Tables 7:5 and 7:6, indicated that Asian ethnic and white readership levels were not significantly different for either the 'Sunday Times' (Asian:White=3%:2%), or the 'Observer' (2%:6%). The Asian ethnic group had, however, a significantly higher readership level for the 'Sunday Telegraph' (Asian:White=10%:4%), $X^2=4.38$; $p < .05$, while the white group had a significantly higher readership level for the 'News of the World' (Asian:White=1%:22%).

Another contrast was provided by the West Indian ethnic group, which had a significantly higher readership level for the 'News of the World', in comparison to the white group (50%:22%), with $X^2=8.26$, $p < .01$. Differences in the West Indian ethnic and white groups were not significant for any of the other Sunday publications.

READERSHIP OF WEEKLY, BIWEEKLY & MONTHLY PUBLICATIONS

An analysis of consumer magazine readership patterns, highlighted the following points:-

- The Asian ethnic segment had significantly lower penetration levels for some 'weekly' and 'monthly' publications in the general consumer market. In

particular, readership levels were significantly lower for 'Woman's Own' (Asian:White=3%:15%), $X^2 = 14.16$, $p < .001$, 'Reader's Digest' (0%:5%), $X^2 = 5.89$, $p < .05$, and 'Vogue' (0%:6%), $X^2 = 5.89$, $p < .05$. Differences with regard to other 'women's' and 'general' consumer magazines, were not statistically significant, but consistently lower in the case of the Asian ethnic group.

- A significant penetration of ethnic publications existed for the Asian ethnic group, particularly for the 'Akhbar-e-Watan', an 'Urdu language ethnic 'weekly' (7 per cent), the 'Garavi Gujarat', a 'monthly' publication targeting the Gujarati-speaking Asian ethnic subgroup (5 per cent), the 'Punjab Times' (5 per cent), and 'Des Perdes' (5 per cent), the latter two 'weeklies' targeting the Punjabi-speaking Asian ethnic linguistic subgroup.
- West Indian ethnic readership levels were similar to those for the white group, for all 'weekly' and 'monthly' consumer publications excepting 'Vogue', a fashion oriented womens', 'monthly' magazine. A high 23 per cent in the West Indian ethnic group, claimed regular readership of the magazine, in comparison to 6 per cent readers for the white group ($X^2 = 8.14$; $p < .01$).

The next part of this chapter discusses the inferences and broadcasting policy implications, ensuing from these media penetration patterns existing for the ethnic groups.

PART 2

INFERENCES FROM ETHNIC MEDIA USAGE

SECTION 7:2

ETHNIC RADIO PENETRATION

Radio penetration across the Asian and West Indian ethnic and white groups had revealed significantly lower radio listening frequencies in days/week, for the Asian ethnic, in comparison to the white group. Weights of radio listening for the Asian ethnic group had again averaged significantly lower, at 7.20 hours/week, in comparison to 9.71 hours per week for white listeners. In contrast, the West Indian ethnic group had been found essentially similar to the white group, both in terms of listening frequencies, as well as the weights of radio listening (West Indian:White=9.80 hrs/wk:9.71 hrs/wk).

A significantly higher proportion in the Asian ethnic group were, therefore, observed to be 'light' to 'medium' radio listeners, in comparison to white audiences who appeared to be mainly 'medium-heavy' to 'heavy' listeners. The majority in the West Indian ethnic group were also estimated as 'medium' to 'heavy' listeners.

A significant aspect of these observations was that, consistently higher levels of penetration prevailed, within

the Asian and West Indian ethnic, as well as white groups, for the locally controlled, Independent commercial radio station (BRMB), in comparison to the national, BBC networked stations. Penetration levels for the BBC stations, mainly Radio 1 and Radio 4, were, moreover, significantly lower for the Asian, in comparison to the white group. Despite lower penetration levels, the Asian ethnic group had significantly higher penetration levels for the 'special' ethnic programmes, regardless of their local or national network affiliations. The West Indian ethnic group also claimed to tune in more to 'comedy' programmes in comparison to white listeners, with differences in programme penetration being statistically significant at the 5 per cent level.

These results confirmed findings on the low radio frequencies and weights of radio listening reported by Anwar, 1978 for Asian ethnic audiences, where it was estimated that they averaged 9 hours of radio listening per week, in comparison to the BBC audience research figure of 9.5 hours per week, for white audiences. Lower weights of radio usage have also been reported in the context of black American listeners (Greenberg and Dervin, 1970), at 1 hour per day or, in other words, 7 hours per week, in comparison to white listener audiences.

While low Asian ethnic audience ratings for radio listening in a general context, emphasised the paucity of programmes oriented to these groups, they support Hartman's, 1974

assertion that '...ethnically related material on the radio appears only sporadically as part of the output constituting news or current affairs...'.

The results signify that, despite high levels of ethnic programme penetration, information related to ethnic groups themselves, is 'limited to the content in ethnic media.' An important implication ensues from the above, in that high audience ratings for ethnic programmes serve to depress audience sizes within the Asian ethnic group for white oriented programmes, thus giving overall lower frequencies and weights of radio listening, for the majority of Asian ethnic listeners. It could be conceptualised then, that ethnic listening frequencies would rise, with any future increases in the ethnic content of broadcast programmes.

While evidence of a similar nature was not obvious in a comparison of the West Indian ethnic and white groups, the higher audience ratings within the West Indian ethnic group for the 'variety' programme category were, nevertheless, indicative of the younger age structure highlighted for this segment (Social Trends, 1983), in contrast to white UK audiences, as well as the appeal of commercial radio for younger age markets in general (Mintel, 1981).

Additionally, high levels of 'independent' radio channel penetration across the Asian, West Indian ethnic, as well as white groups, were consistent with the radio market shares

reported for white audiences in Mintel, 1981 research, which gave the order, Independent:34%, Radio 1:25%, Radio 2:22%, Radio 3:6%, Radio 4:10% and BBC local Radio:6%. Obviously, 'independent' local radio stations have done much better than BBC-oriented, local radio stations, in gaining audience shares.

An interesting fact was that, significantly higher audience ratings were noted within the white group, for the national BBC network, with Radio 1 the most popular (23%), though Radio 3 was estimated very much a minority station, across both, Asian and West Indian ethnic as well as white groups. The higher levels of BBC Radio penetration for the white group, are evident in Mintel's, 1980 assessment:-

"....The BBC still seems to obtain a certain reverence from listeners and to maintain a reputation for obtaining the 'best programmes'... With regard to Radio, the BBC has a near monopoly of serious programmes which may be thought 'better' in some sense than the more light hearted approach of commercial radio.."

At the same time, the preferential penetration of 'special' ethnic programmes, regardless of network affiliations, among Asian ethnic audiences, was reflective of the competitive advantage that can be exploited by either local 'BBC' or 'Independent' stations, in their greater ability to provide services that attract ethnic audiences away from other radio programmes. The consumption of ethnic media programmes also confirms similar findings on Asian ethnic listening patterns

by Anwar, 1978, who indicated that ethnic programme choices
~~~~~  
were dictated more by the highly generalised 'ethnic' content  
of 'special' programme features, than any special aspects  
that might serve to enhance their exclusivity.

The competitive success of commercial radio, particularly, in  
gaining market shares, is described in Mintel, 1978 reports:-  
~~~~~

"....The stations have been active in trying to
establish their identities.... Elsewhere, it varies
from relative obscurity to a thriving local
presence. The normal blend of music, sport and
news, has become familiar in most areas by now.."

And again, in a further remark contrasting the BBC with
Commercial radio, Mintel, 1978 describes the situation:-
~~~~~

"... Undoubtedly it was the rather stuffy approach  
of the BBC that helped to give rise to commercial  
radio in the first place... with liveliness as the  
sine qua non of its existence..."

Additionally, the success of commercial radio in the local  
context, since its 1973 institutionalisation, with a fanfare  
of publicity regarding the mixture of music and local news,  
is evident in Mintel's, 1978 remark:-  
~~~~~

"..Contrary to the initial belief that only the big
conurbations could make a profit, the smaller local
stations have in general prospered, with closer
community feelings upon which local radio audiences
can be built.... It also seems that aggressive
localism... is the recipe for commercial radio
stations."

The success of commercial radio has, undoubtedly, been entirely dependent on advertising revenue. As Mintel, 1981
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research records:-

"Most stations are relying more than ever, on their local advertisers... The large stations rely on 50% of their revenue coming from this source, medium size stations 80%. The lower rates charged by small stations attract a higher proportion of small local businesses who can afford them.. Also, radio advertising has much improved since the early days, and is often as lively and amusing as the programmes themselves. There is also a high information content - eg. local store offers - that makes it useful in a way that much television advertising is not."

On an overall basis the findings indicate, that the locally oriented BBC and 'Independent' radio stations have, both taken advantage of appealing to audience sensitivities in the Asian ethnic group, via the use of ethnic language formats. The importance of ethnic radio for the audience entertainment of these groups was recognised by Mitchell, 1978 as follows:-  
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"With formats that are based on a musical appreciation of eastern themes geared to light entertainment, ethnic radio does provide an outlet for ethnic culture, which is given breathing space for its cultural habits within the total aerial environment of another class." (p.69)

An additional fact in this context was, that since ethnic audience penetration by the local (both, BBC and Commercial), and, to a smaller extent, the national BBC stations, was based on an appreciation of the same thing, namely the 'ethnic' flavour, rather than 'content' of ethnic programmes

which are essentially similar in taste, the local and national media are, in themselves, not as yet involved in any significant competitive activity but serve, rather, merely to complement each other.

The local ethnic programmes especially, have served more in the nature of providers of information within a 'what's on' local framework. Consequently ethnic radio programmes appear, irrespective of radio station or of local or national orientations, only to have succeeded in reconciling the diverse needs of the various Asian linguistic subgroups, for all types of information, education, advice and entertainment.

This aspect is also highlighted in the discontent that was recorded for Asian ethnic programme content, which was found sadly lacking in appeal and, catering to overall ethnic tastes (Anwar, 1978), rather than to subgroup tastes within the segment.

The evidence brings to the fore, the need for further specialisation of ethnic programme content and formats, as they attract larger audiences with the increasing consumer population size of this segment. The need for ethnic format specialisation becomes all the more marked, for targeting ethnic audiences through commercial radio programmes that are heavily sponsored by local retailers and advertisers buying advertising space in the ethnic media publications, and who

are, therefore, heavy users of advertising time on these programmes (Piper, 1977). The major product categories for which ethnic audiences were sold to advertisers, were noted to be the food and air travel service categories, with major selling efforts also applied by companies dealing with the automotive, finance, banking and insurance, jewellery and apparel, and stereo equipment categories (researcher's assessment). In fact, it was gauged that ethnic food retailers especially, appear to have found advertising in ethnic media a profitable means of promoting sales to the ethnic markets.

The incidence of linguistic subgroups within the Asian ethnic segment appears, moreover, to have resulted in the use of local ethnic flavours based on intonations and musical styles typical of the local ethnic sub-markets. However, the need to attract maximum saleable audiences could be said to have resulted in the lowest common denominator in tailoring ethnic ad-messages, as well as programme content. Consequently, it can be concluded that, this has given ethnic programmes on radio and television, the semblance of an innocuous mixture of ethnic pop music and trivial news items, similar to the entertainment content that predominates in the mass media, targeting white audiences.

Despite the fact that local and national media are meant to operate for different reasons, with programmes aimed at drawing different audiences, a similar kind of generalised

rationale appears to have operated in the case of both, local and national BBC programmes, which attempt to draw the largest popular audiences and, have therefore, resorted to gross oversimplification of the similarities and differences that characterise the various ethnic sub-segments. As a result, ethnically oriented programmes try to cover a conglomerate of Asian ethnic subgroups which are otherwise cut across by nationality, religious and linguistic subcultures, as well as by a range of age-groups with different audience requirements. This could be said to have effectively reduced the buyer-seller relation, intended for the supply and output of radio programmes, into a distinctly subordinate relation for ethnic audiences. While this latter aspect regulates programme demand by shifting the locus of decision-making away from audiences, it has also had the indirect effect of exacerbating the discontent in ethnic audiences and, ultimately reducing programme content, as the more selective among the ethnic audiences, drop out.

Despite inconsistencies in Asian ethnic programme formats it must be recognised that, ethnic advertising space and time in radio programmes do prove much more cost efficient in promoting ethnic product sales, than the general media. The ability to sell ethnic consumer markets through their own programmes, has thus provided ethnic marketers with an attractive investment potential, especially for 'heavy user' product categories among ethnic groups.

The importance of local radio advertising for 'heavy user' categories, even for white audiences, was thus recognised by Mintel, 1980 as below:-
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"... Advertisers have begun to respond to the obvious growth in the radio audience... The three main categories of advertising on radio are leisure, retail, and food, in that order. Provincial stations rely heavily on local retailers, while many national food manufacturers have used radio effectively... In the USA, food and auto advertising lead the radio field. So we may see more motor related advertisers moving into the radio in the UK... However... In order to harness the influence on consumers... advertisers will have to maximise its potential as a coverer of information about their locality."

Whether or not these contrasting trends continue, depends on the likelihood of 'local' BBC and Commercial radio stations putting more emphasis on their parochiality, and thus diverting audiences away from the 'national' stations or, alternatively, competing directly with the national stations in terms of programme content. An important implication for 'local' radio, particularly, was that it appeared to have growth prospects within ethnic broadcasting. At present, however, the evidence gives every indication of Independent radio being a potential growth area, along lines similar to its proliferation, to date, within the British broadcasting system. It thus represents a successful challenge to the monopoly of ethnic, BBC programmes, or, in Mintel's 1981 terms, '... in a free enterprise society..., offers yet another media option..'.  
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SECTION 7:3 ~~~~~

ETHNIC TELEVISION VIEWING ~~~~~

While television viewing frequencies and weights of viewing were consistently high (5 or more days/week), across both, Asian and West Indian ethnic, as well as white audiences, the Asian ethnic group had, additionally, significantly high penetration levels for the BBC oriented, Asian ethnic programmes.

The high levels of television ownership, as well as viewing frequencies within the Asian and West Indian ethnic groups, gave every evidence of easy acceptance of the product class, as well as its popular visual appeal, despite the fact that there was very little culturally significant to the ethnic groups, or that they actually did 'have', to watch, given their different linguistic and cultural orientations. It follows then, that Asian and West Indian ethnic audiences are conditioned to tuning in as 'invisible audiences', to a medium heavily oriented toward entertainment programs with white media content.

The results also substantiate previous research on Asian ethnic viewing patterns (Anwar, 1978), which indicated high levels of television penetration, particularly significant for the inclusion of a high 47 per cent, non-English speaking Asian ethnic viewers. Given these facts, there can be no

doubt about the medium's popularity for Asian and West Indian ethnic as well as the dominant white audiences, to which it is directed. The data suggest, moreover, that television viewing especially for the non-English speaking sections of the Asian ethnic audiences, was not dissimilar to the audience viewing in the early, pre-war nickelodeon movies, that did not rise far in taste or seriousness, but were a considerable source of solace and entertainment, with simple plots and styles and, acting which needed no knowledge of language in order to follow...' (Blumler, 1976).
~~~~~

An analysis of ethnic TV programme preferences indicated that, in addition to higher audience ratings for 'special' ethnic programme within the Asian ethnic group, there were also significantly higher penetration levels within both, Asian and West Indian ethnic groups, for the 'variety' programme category. While these preference patterns were consistent with the greater penetration of 'Independent' television, for both these groups, it could be speculated that they are related to the fact that, 20% of ITV programme transmission hours are devoted to 'light' entertainment features, inclusive of the 'variety' format, in comparison to 11.6% of BBC transmission hours (Market Research Great Britain, 1978).  
~~~~~  
The above programme preferences indicate, moreover, a programme type pattern where audience ratings in these groups are consistent with a form of enforced watching due to fascination with the programme category, where programmes are viewed because there is simply nothing better

to interest ethnic audiences.

It could be inferred that while the market demand is obviously secure, in terms of both ethnic television ownership levels as well as audience ratings, this still would not rule out the fact that there is an imminent need for redefining and enlarging on presently meagre, ethnic programme content and formats. As a policy area that requires attention, both in terms of TV programme time, and resources, ethnic television broadcasting was brought to the fore in the Annan Report, 1977, for its stress on:-
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"... the need for special ethnic programmes for IBA areas with languages other than English, in common use..." (p.233)

The adoption, moreover, of pluralistic programming policies, was emphasised in the Race Relations Act, 1976, which  
~~~~~  
asserted the need for:-

"... pluralistic integration with cultural diversity, rather than the flattening process of assimilation..."

Contrary to the need to assess existing patterns of television programme content, it could be stated that present policies employed in the case of both, the 'national' and 'local', BBC and Independent channel networks, as noted by Mitchell, 1978, take '...so much for granted, that they
~~~~~  
hide the gulf..', between what could be done for ethnic

programmes, and what is being done. The guiding norm of all television programme policy has been encompassed, rather, in two fundamental aspects, firstly, the need to ensure the 'acceptability' of television programmes by the majority and, secondly, to make for 'continuity' in programme content, in order to be sure of attracting large, on-going, audience sizes, with both prevailing aspects having inevitable repercussions in making for stereotypical, ethnic programme production.

Justification for the 'acceptability' hypothesis in the BBC programme network, since its implementation, was based on its decision to provide a single service of programmes of universal appeal, with the only commitment since the Television Act, 1954, being, '..not to offend public tastes...'. As a result, BBC television policy has consistently aimed at standardizing media content to levels of acceptability and treating as homogenous, what are in fact a tangle of dissimilar groups. Despite the fact that BBC programming began as a worthy embodiment of the 'respectable mode', it has, in recent years, rapidly adapted to the popular, mainly due to the competitive activity of the Independent, commercially oriented television stations whose only aim was to attract the masses, rather than maintain high standards.

The 'acceptability' principle by the ITV was derived, in contrast, largely from its decentralised nature, since it did



not have the same natural elements of cohesion compared to the centralised BBC structure. Instead, the ITV used the challenging principle of 'public' broadcasting and, resorted to the '... language of the disc jockey and the advertiser..' (Mintel, 1981). Competition with the BBC meant the intrusion, via ITV network programming, of other renderings of 'Britishness' and rightmindednes. Consequently, commercial television has since broken into the BBC monopoly, by disaggregation of the national audiences. Since light entertainment was recognised as the big audience puller and undisguised ground-bait for audiences, Independent television programmes have ended up attempting to transmit life, blurred of any segment identities or differences which have therefore been as difficult to recognise, as the BBC's professed aim of 'raising standards of public taste'. Thus, while the ITV increased the sources of providing constant entertainment, it has become, like the BBC network, a system organised on the assumption of a basic uniformity of tastes with the best way to provide broadcasting being, to make sure that the material reaches as many people as possible.

As they exist at present, it could be speculated that, both channels represent a '... stunting obliteration of individual differences', with programmes in which the doctrines of 'universal appeal' or 'no offence', find their apotheosis. Consequently, the most saleable TV commodity, 'time', is used by both channels merely to reproduce minor variations in existing programme content, when it could, in fact, have been

used to heighten ethnic and white audience sensibilities, through the use of contrasting programme styles. This orientation was aptly described by Mitchell, 1978, as stated below:-

"... The established formula of acceptability has become an unremitting onslaught on any authenticity in television entertainment. There is always something on, with no thought for differential allowed..." (p.72)

In a similar vein, the 'continuity' aspect in television programming policy, also appears to have worked to the disadvantage of encouraging ethnic formats, in its adherence to the need for attracting large and continuous ethnic audience sizes. This has worked as an important governing point, especially for advertisers, since fairly stable audience sizes are required at each point in time, in order to have some idea and guarantee, of what future ethnic audience sizes they would be buying. Given these circumstances, repetitive programming, with its element of continuity, has tended to superimpose on ethnic as well as white-oriented television serials, a stereotypical film structure or, what has been termed by McQuail, 1969 as, a form of '... ritualism, in its reliance on formulae that seem to have worked in the past, and therefore can be projected to hold the attention of large numbers of people...'. Nevertheless, the policy could be said to have resulted in a bias by advertisers, '..against including any programme material at odds with the prevailing, ostensibly white,

'audience image', because of the high degree of credibility with which television is vested...' This was described by McQuail, 1969, as follows:-  
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"The stereotypical presentation of TV programmes results in considerable obstacles to the development of policy makers, of any perception of the audiences. Instead, the resulting uncertainties are likely to be resolved by forming stereotypical impressions of audience characteristics" (p.49)

Such stereotypical media themes of 'acceptability' and 'continuity' have resulted, quite significantly, in a marked absence of black faces in television programme content. Consistent with this, Lemon, 1968 found that, in 1967, there were barely 2 per cent American commercials using blacks, orientals, Puerto-ricans, or Indians, despite the fact that they comprised an estimated 11 percent, invisible television audience of the US population. Similar evidence was reported by Dominick and Greenberg, 1970 who found, in a content analysis of prime, and day time US television programmes, that there was '..only an insignificant shift' in the black faces in TV programmes, from 1 black face every two hours in 1967, to 2 every two hours, in 1973. An extension of the content analysis study to British television programmes, also by Dominick and Greenberg, 1970, gave evidence essentially similar to that observed for American television shows, namely, that non-whites were found in 2.5 per cent of all British commercials, i.e., that they comprised 0.8 per cent of 'all people in ads'. Of this percentage, it was found,

funnilly enough, that nearly half the non-white faces on British television were those from US programmes shown on British TV shows or, in other words that, '....British presentations of non-white faces, inclusive of Indians, Pakistanis, Orientals, West Indians and Africans, were virtually non-existent in TV commercials or drama programmes, for both the Independent and two BBC channels...'. .

Given this absence of ethnic television presentations, despite heavy ethnic audience ratings for TV programmes, it is evident that, advertising and broadcasting have, over the past, tended to carry with them a cultivated indifference to ethnic groups which, for the most part, have been casually dismissed as part of the audience at large, and seen as essentially 'moronic', to be '...domesticated into western life-styles..'. The marked absence of ethnic faces on British television would be consistent, rather, with what was referred to in the Pilkington Committee Report, 1971 as:-
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".. the natural 'vice of television', its tendency to trivialisation - the unconditional surrender of critical faculties, unthinking conformism, fear of the erosion of differences in aesthetic tastes, differences in cultural values, differences in moral standards, and thus the vulgarisation of everything and everybody, or what Americans have called massification.."

The ensuing dilution of TV audience tastes can, therefore, be considered to have resulted from the attempt to provide the masses '...a certain amount of wholly undemanding distraction, in order to allow them a cushion against reality...'. This

appears to have led, in turn, to a blurring of edges between items and programmes, and an ironing out of any prevailing differences. The use of this policy, was appropriately summed up by McGormick, 1970 as below:-

~~~~~  
"... It is easier to dilute interests and tastes, and to make sure that all tastes are represented in the programmes, rather than represent them in their full variety. Special outlets for special groups or interests, were never seriously considered..."

Instead, the fact that television programmes, as noted above, function on a more or less continuous basis round the clock, has meant, over the years, that the audience be given '..more and more of the same thing..'. To a large extent this also meant that 'quantity' tended to dominate 'quality', and that, being so expensive, programmes must be such as to appeal to the majority element, most of the time. Particularly with regard to the BBC networked radio stations, this has meant that while the BBC reduced, virtually to zero, the marginal cost to every member, of '.. full access to a culture that was previously available only to a middle class minority, it has still left itself open to the charge of complacency'. Viewed in the long term, the role of television programme policies as they impinge on ethnic groups, can be summed up within the general audience context, as it is defined in the 'purposes and ideals of public broadcasting policy', as indicated by Briggs, 1969, for the BBC network:-

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".. The task of the broadcaster is to give the customers what they want... This demands that the

publics be treated with respect and not as nameless aggregates. In any case, it is better to overestimate the mentality of the public, than to underestimate it in the maintenance of high standards... So while the BBC is one corporation, it has many voices but one mouth. Since it can speak in many styles, the variety will be due to difference in subject matter, rather than due to any inconsistencies..." (p.239)

Despite the formulation of such policies however, there is little evidence that television as a medium, either via the BBC, or the supposedly more flexible 'Independent' television networks, does provide a communications environment effectively covering a wide range of satisfactions or, one that is in any way, optimal for all 'special' and 'ethnic' groups.

This tendency appears, in fact, to have been built into the very nature of British broadcasting which, functioning as it does within the limits set by the 'law of minimum offensiveness', is producing better or worse programmes, within the mass audience framework. In the context of future advertising policies, it could be asserted that, the contemporary dilemma facing television programming in accommodating ethnic interests, requires a shift in emphasis from presently produced programmes targeting white mass audiences, to those catering to several special interest groups. While some efforts have been made in delineating special interest groups within the white audience structure, the evident lack of efficiency in broadcasting policies, was voiced in Matheson's, 1933 cogent criticism:-  
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"...Broadcasting is only stimulating, constructive and valuable, in so far as it can stiffen individuality and inoculate those who listen, with a capacity to think... The ripples started by silly noises, sounds that are silly or vulgar or false, spread further, and pollute more widely, that is all. Broadcasting may spread the worst features of our age as effectively as the best..."
(p.17)

ALTERNATIVE ETHNIC MEDIA

THE ETHNIC VIDEO MARKET

An alternative channel of communication, fast penetrating the ethnic markets, was noted to be video broadcasting. As a non-network, entirely ethnic communication system, the use of video recorders, though on a small scale, was found to allow for more plural broadcasting, where TV sets were used by ethnic groups for cultural appeals through the purchase of video cassettes and discs. The medium apparently served as a via media to policies of either BBC or ITV expansion of ethnic programme content in the near future, through limited television channels along already crowded wavelengths.

ETHNIC BROADCASTING VIA CABLE TELEVISION

Another broadcasting medium presently given recognition for its high potential penetration with regard to the ethnic groups, was 'access broadcasting' (Annan Report, 1977; ~~~~~)

p.216)), via local cable television networks to be installed during the 1980's decade.

While four cable television stations were established in 1970-1972 in Britain, only one, at Swindon, survived. The importance of cable television as singularly suitable for providing programmes for ethnic minorities, and as an alternative to existing TV channels was thus noted, accordingly, in the Annan Report, 1977 as follows:-
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"... The ethnic groups continue to show a rugged determination to preserve their national culture and customs... Cable television allows leeway for the production of local ethnic programmes rather than arranging for additional programme services to be provided by the existing networks, thus allowing the local community to effectively communicate with itself.. and... serves as stimulation for the production of ethnic programmes under the local broadcasting authorities." (p.222)

It is obvious that in the future, local cable television will provide a communications environment, allowing ethnic groups the differential access necessary to affirm their specific cultural identities and values. Given that ethnic programme policies for both, BBC and Independent television networks are subject to prevailing cuts and commercial profit motives, which only rationalise the existing indifference to ethnic cultures in themselves, the expansion into cable television networks will possibly serve as an optional avenue, extending cultural power into the hands of the ethnic groups.



## SECTION 7:4

### ETHNIC READERSHIP PATTERNS

Ethnic readership patterns for consumer publications had indicated that, while Asian ethnic readership levels for English-language daily newspapers were not different from those for white readers, they were lower for all morning dailies. In addition, ethnic readership levels were significant within the 'Urdu' reading, Asian ethnic linguistic subgroup, particularly for the 'Daily Jang' ethnic newspaper, and also for biweekly and monthly ethnic language magazines, such as the 'Akhbar-e-watan', 'Des Perdes', 'Punjab Times', and 'Garavi Gujarat'. Asian ethnic readership levels were also significantly lower for most white-oriented 'weekly', 'monthly', 'general' and 'women's' consumer magazines.

Readership levels within the West Indian ethnic group were, however, observed to be significantly higher for the 'Vogue' fashion monthly, but essentially similar for all other consumer publications, as well as morning and evening dailies.

It was evident from the findings that, within the Asian ethnic group, readership of ethnic publications essentially supplemented the English-language, daily and Sunday newspapers. However, it could not be denied that the

debasing influence of commercial pressures, evident in white-oriented media publications, was also obvious, particularly in ethnic tabloid weekly and biweekly consumer publications (researcher's emphasis). As a result, a perusal would convince even the casual observer that, ethnic periodicals have begun to evince a steady increase in triviality and distraction, forced on these publications by the commercial concerns that advertisers find it profitable to play with.

Since the readership of ethnic publications was selectively biased towards linguistically-oriented, ethnic target subgroups, this would imply that magazines are being propagated for their primary, service-oriented function of catering to language tastes and interests through 'what's on' formats, similar to those used in ethnic television and radio programmes, but with relatively greater ethnic emphasis on articles and features that bring out aspects of discourse, argument, opinion, common to these groups. Given this orientation, it could be asserted that, because of the need to disseminate information in volume, printed publications serve better than either BBC or ITV broadcasting networks, in allowing for more detailed information and instruction that can, additionally, be retained for on-going reference purposes, by ethnic language readership segments.

The growth potential of ethnic publications would thus be attributable largely to the fact that, they serve as objective sources of information that is not available

through the general broadcast media. Yet another aspect contributing to their success, was argued as their greater consistency with ethnic subgroup belief structures, and the greater confidence they engendered. It could therefore be considered that, the publications exist out of necessity, in their aim to build positive ethnic self images. The significant penetration levels of the ethnic 'daily', 'weekly', 'biweekly' and 'monthly' publications were, accordingly, indicative of the high element of empathy achieved through them.

The importance of the 'special' magazines sector itself, in this context, is stressed in a Mintel, 1978 report, as below:-

".. If marketing is about the satisfaction of consumers' needs, then the consumer magazine market must be paradise, since few tastes and interests are not catered to... During the 1970's on average each year, nearly 200 titles died and 200 new ones were born. While general magazine circulations fell in total over the period, as did women's magazines, special interest publications grew in volume... It is unlikely that anyone will attempt to launch a general interest magazine in the foreseeable future..."

In fact, Mintel, 1982 analyses, commenting on British Rate and Data (BRAD) reports, which serve as a national guide to media selection, described a listing of over 1500 magazines, in about 50 different categories, inclusive of the ethnic magazine sector. While estimates of the total circulations of ethnic magazines were not given, mainly because too few

publications as yet supply certified circulation figures, Mintel, 1982 research gave some idea of the relative size of the ethnic magazine market, by recording the number of magazines in the ethnic publication sector as 25, making this larger than special interest sectors which had magazines noted to be of the order, Wine & Beer:4, DIY:5, Consumer Video:7, Gardening:12, Photography:13, Health:13, Angling:13, Camping:13, Electronics:17, Motor Cycling:23, and Teenage & Pop:23.

Despite their service orientation, it is clear that ethnic consumer magazines are essentially commercially oriented interests, that have carved out for themselves, an economic niche with divergent linguistic formats (Appendix F), differentiating the ethnic subsegments within the market. Since very little duplication across targeted subgroups was found to occur, the ethnic publications had limited circulations, delineated by the consumer sizes of the linguistic groups. However, the relatively wide range of ethnic magazine cover prices (20p-50p), implied that profits could be made from sales as well as advertising strategies. Advertising in the magazines was, moreover, almost entirely ethnic in nature (researcher's review), with advertised brands, those available in the UK. An analysis of ad content also revealed that, as in the case of radio advertising (Section 7:2), cars were an important category, followed by stereo equipment. It can be concluded that, while the leading ethnic magazines have established sizeable

circulations that are stabilising after their initial product life-cycle growth periods, they are becoming an obvious way of advertisers to reach ethnic consumers.

It is evident then, that given the cultural appeals within which they function, the credibility of ethnically oriented media would get transferred to the advertised messages carried in them, allowing a special opportunity to advertisers, in targeting the linguistic subsegments more cost-effectively, than through ethnic radio and television broadcast programmes which operate at the overall ethnic group level or, alternatively, via general white-oriented media. It could then be argued that, buying space in ethnic media publications will therefore continue to remain attractive to ethnic advertisers. A notable fact evidenced in the case of minority publications targeting American ethnic groups as well (Green, 1979), was that they are supported largely by ethnic business concerns and retailers, who are the largest placers of ethnic advertisements for product categories, similar to those advertised in commercial radio campaigns, namely automotive, stereo, apparel, food, finance, banking and other 'service' industries, catering to ethnic needs and interests. While these product groups are similar to those advertised via commercial radio campaigns targeting white audiences, they had the additional advantage in ethnic publications, of enhanced impact via ethnically oriented appeals.

The greater visibility accorded ethnic consumers by ethnic publications, in comparison to white oriented media served an important promotional feature, since it gave to ethnic groups an identity wholly lacking in the white, mass oriented, print and broadcast media. The invisibility of blacks in printed publications, was, as in the case of TV noted in Section 7:3 above, emphasised in a number of continuing research studies on black groups in the US (Shuey, 1953; Colle, 1968; Cox, 1969; Kassarian, 1969; Colfax and Sternberg, 1971; Stempel, 1971). Thus, blacks were estimated as having shown only a minimal increase, from 1% to 2%, of all advertisements over a ten-year period, 1953-1968 (Cox, 1969). This was confirmed by Kassarian, 1969, who estimated an increase in black visibility over the 5 year period, 1964-1969, to be less than 2% of all ads. In a series of on-going research studies, conducted by Stempel, 1971 for ethnic media content, over a range of magazines including 'Life', 'Look', 'Newsweek', 'Time' and 'US News', it was similarly indicated that, by 1970, blacks comprised only 3% of all ads. A parallel study by Colfax and Sternberg, 1970, though on a different set of publications, again estimated 'visible' black faces to be only 7% of all ads by 1970.

Studies on ethnically related material in British print media, also substantiate the invisibility of Asian and black ethnic groups. Thus, a content analysis of British newspapers for ethnically related material (Troyna, 1981),

indicated that, the publication with the most coverage of ethnically oriented articles was the 'Times' newspaper, with 'only 2 items of race-related content per copy', thus substantiating the fact that there exists at present, an extremely unbalanced picture of Asian and West Indian ethnic groups, which were presented in the media, as '... a faceless, amorphous mass'.

Given such a situation, the steady proliferation of ethnic media publications, could be said to have filled an existing product gap ignored by white media, by ensuring a significant amount of visibility to Asian and West Indian ethnic subgroups of varying nationality identifications. In reference to the West Indian ethnic press, which attempts to create a separate and distinct, even radical, revolutionary identity, Chase, 1976 asserted that:-  
~~~~~

".. The emergence of the black press in Britain, posits the different cultural norms and ideologies within the West Indian segment, contrary to the emphasis given by white media, on West Indian similarities to whites, with only a thin line of reference... Rather, the black press has been formed with a clear ideological perspective of providing information geared to advancing economic goals and making the West Indian a more powerful force than one living on reggae, soul and jazz music.."

While the economic imperative is not absent, the black image portrayed by the West Indian press, is still radically different from the white-oriented, TV portrayal of blacks, in formats entailing 'ethnic conflict', 'confrontation', or of

'ridiculing humour', as well as patronising tones adopted in the newspaper portrayal of blacks, when covering sports. The meagre utility of the white-oriented media to West Indian readers, is brought out thus, in Chase's, 1976 remark:-
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".... It is doubtful if the existing white media will change, either to any extent or with much speed; because they depend on the white audiences for their continued existence, the white media are bound to supply and reflect the attitudes and prejudices of their readers..." (p.475)

Within such a situation, it becomes increasingly evident that, through the stereotyping of routine definitions, the media have, over time, become extremely passive in reporting race relations within a predetermined stereotypical context, in addition to simultaneously becoming part of a closed system not changing attitudes to any great extent.

An important implication is that, despite these stereotypical presentations, ethnic consumers in central city areas, are exposed to advertisements for heavily used product categories which, therefore, are potential ethnic growth markets, even as they simultaneously attempt to assess, and modify, ethnic consumer lifestyles.

Consequently, the overriding factor ensuring media success, continues to remain the emotional gratification provided through cultural symbols related to ethnic lifestyles. The fact that the use of emotional appeals is addressed, additionally, to language needs and aspirations of readership



groups, justifies the need to maintain and propagate the ethnic economy through advertising revenues, which might otherwise be regarded as an unnecessary expense by publishers targeting minority ethnic markets.

An interesting point was that, a number of Asian ethnic publications were bilingual in content (Appendix F), with a small number virtually all-English in language content, even while distinguished from white-oriented magazines by ethnically oriented formats and product-ad appeals. As a publications strategy, it could be asserted that this has secured a larger circulation across the ethnic language groups and, appears to indicate, moreover, that language itself is of secondary importance in securing the long-term success of ethnic publications, with cultural appeals being the primary motivating factor.

The faulty positioning of a number of ethnic publications, however, and consequent financial planning errors, can be considered to have contributed to the phasing out of a number of publications, mainly because they cost more to produce than the retail price and, would, therefore, have a high tendency to get priced out without sufficient revenue to pay for themselves. Additionally, distribution charges are estimated at 50% for each copy sold (Mintel, 1978). Compounding these difficulties, is the acknowledged fact that, minority publishers tend to be idealists, with at least part of their journalism founded on criticism rather than

praise, so that small publications operate under the pressure of 'not publishing items that might result in a withdrawal of advertiser support, or else lose ad revenue'. Yet another fact observed in the case of ethnic media targeting black and Hispanic American ethnic groups (Forkan, 1979), is the high tendency for 'low cost ethnic advertisements', to 'lose impact and look out of place, to readers exposed to more sophisticated ad campaigns, used in the general, white-oriented publications..'. A number of ethnic publications were therefore estimated to have fluctuated in stability, with short publication life-cycles, and quick demises. Given this situation, ethnic publication can be expected to remain tough business, with the major challenge to ethnic print media being that of attracting a larger proportion of advertising revenue, through 'heavy user' product categories, in order to achieve a certain measure of stability.

These associated drawbacks do not, however, detract from the fact that ethnic publications serve a complementary function to ethnically oriented radio and television programme formats. Together, they form an ethnic communications environment, in which the supremacy of printed publications will continue to remain their differential emphasis on linguistic readership groups.

## SUMMARY AND CONCLUSIONS TO CHAPTER 7

Major summary impressions on the media usage of ethnic groups, were as below.

### 1. ETHNIC RADIO LISTENING

The Asian ethnic group averaged lower radio listening frequencies compared to the white group and, also, lower weights of radio listening in hours/week, in comparison to white listeners. The majority in the Asian ethnic group were 'light' to 'medium' listeners, in comparison to 'medium' to 'heavy' listeners in the white groups.

In contrast, the West Indian ethnic group averaged similar radio listening hours to the white group, with the majority, 'medium' to 'heavy' listeners.

The Asian and West Indian ethnic groups averaged higher audience ratings for 'local' (BBC and Commercial), stations, rather than 'national' BBC, in comparison to the white group.

Ethnic language programmes had significant penetration levels within the Asian ethnic group. In comparison, West Indian ethnic programme orientations, were more or less similar to white preference patterns.

## 2. ETHNIC TELEVISION VIEWING

The Asian and West Indian ethnic groups were similar to the white group, with regard to high television viewing frequencies in days/week, as well as weights of television viewing, in hours/week.

However, Asian and West Indian ethnic viewers had lower channel loyalties in comparison to white viewers. Even so, ethnically oriented programmes projected via the national BBC 1 and ITV networks, had significant penetration levels within the Asian ethnic group.

## 3. ETHNIC READERSHIP LEVELS

The Asian ethnic group had consistently lower readership levels for the English language morning and evening dailies. West Indian ethnic readers averaged approximately similar proportions as white readers, for all daily morning and evening newspapers.

Additionally, penetration levels for English language Sunday newspapers were not significantly different, in comparison to the white group, except for the 'Sunday Telegraph', which had a higher proportion of Asian ethnic readers, and the 'News of the World' and 'Sunday Mirror', which had significantly more white readers. The former newspaper also had a higher proportion of West Indian in

comparison to white readers.

Significant penetration levels occurred, for the daily ethnic newspaper, the 'Daily Jang', as also for ethnic 'weekly' and 'monthly' publications, within the Asian ethnic group.

It seems clear from these results that, the Asian ethnic groups have proved to be self-segmenting in their media tastes, with high levels of penetration for ethnically oriented radio and television programmes, as also for ethnic consumer publications. Given the nature and extensive costs of broadcasting, this may have been an obviously desirable solution for ethnic marketers. Consequently, it can be concluded that, strategies based on positioning programmes, especially for television network shows designed for distinct and different cultural tastes within the total audience, would themselves serve the purpose of providing for ethnic contrasts without diluting audience preferences and, thus, ultimately maximize ethnic audience shares.

At a local level, ethnic radio stations, especially the non-BBC network affiliated stations, appear to have effectively proved their impact on ethnic audiences. They are obviously being bought up, therefore, by ethnic advertisers, since commercials on ethnic radio stations have previously been seen to move advertised product lines, regardless of ethnic audience ratings.

In terms of cost-effectiveness, the locally broadcast radio programmes and media, hence constitute an important means of selling ethnic segments to advertisers, for particular categories of advertised products.

Given the cultural appeal of linguistic dialects, it is obvious that media-based gratifications will cause ethnic media to continue to grow in the future. Even so, language itself was concluded to be of secondary importance in targeting these groups, with ethnic cultures being foremost in importance. While the white media cannot be said to be totally ineffective in reaching ethnic segments, their broad impersonality would not give them the same clout in selling the ethnic markets.

Ethnic audience ratings will, however, continue to pose problems to white marketers because of linguistic barriers. Moreover, the negative ethnic stereotypes and, adverse publicity perpetuated over the past decades, have helped to keep major marketers from considering ethnic consumer potential at all. Consequently it could be said that, local ethnic media have succeeded in the business, only because ethnic advertisers and retailers have better background information on these cultural markets, their ethnically oriented musical tastes and, the use of ethnic linguistic phraseologies, along with the ability to sell the audiences, and communicate with them as 'special interest' segments.

An overall consideration of the usage by these groups, of ethnically-oriented specialist media, leaves no doubt that, as channels of communication, the latter do hold tremendous marketing opportunities, with high penetration levels and potential returns on media investment. Dictated by the need to attract maximum ethnic audience sizes, however, and to draw advertising revenues through product sales, the local and national ethnic media would appear to have gravitated towards providing entertainment, aimed at the 'maximum acceptability' or 'massification' principle, similar to that used in white-oriented media. Despite such constraints, the cultural entertainment they provide, will continue to result in 'segregated' ethnic audiences, and a challenge to marketing and advertising strategies, through the creation of a special new field in the ethnic media world.

Having confirmed then, that the 'accessibility' of ethnic groups does make them amenable to effective market segmentation strategies, the investigation next examines them on their differential susceptibility to alternative media advertising appeals.

## CHAPTER 8 ~~~~~

### ETHNIC ADVERTISING ~~~~~

#### INTRODUCTION ~~~~~

This chapter aims to determine the effectiveness of communication strategies in marketing goods and services to the Asian and West Indian ethnic and white consumer markets, and find out whether strategies are differentially related to ethnic and cultural backgrounds.

More specifically, it attempts to explore ethnic advertising by estimating the impact of alternative ad layouts, for their influence on ethnic attitudes and perceptions. In so doing, it questions whether there are unique, culturally structured consumer motivational patterns, such that advertisements must be designed with specialised appeals.

Empirical research on the effectiveness of ethnically oriented advertisements, has been the focal point of debates pertaining to US ethnic groups, since the mid-1960's. These were triggered by the pressure of government bodies and trade associations on advertising agencies, to alter the ethnic composition of advertisements directed to mass audiences, so as to give greater visibility to black consumers (Boyenton, ~~~~~ 1965).  
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Advertising to ethnic groups has, moreover, become a source of concern to marketers, with the increasing size of the black market over the 1960's and 1970's. Thus, the Jewish (Forkan, 1979); and the Japanese ethnic groups (Dalrymple, 1972) have, over the years, established themselves within the middle class American consumer markets. The buying power of the Negro market has also grown simultaneously, so that there is now a sizeable middle class black segment (Forkan, 1979), in existence. Additionally, the Spanish-speaking, Hispanic segment has come to the fore in recent years, as an ethnic language market that is culturally different, in the advertising strategies required to reach it.

The largest of these segments, posing a challenge to advertisers, however, continues to remain the black consumer market. To date, white media advertisers have been hesitant to launch black advertising campaigns, because of the possibility of alienating white audiences. Moreover, any ensuing backlash, followed by the refusal of white audiences to buy products advertised via 'integrated' campaigns (Plotkin, 1970), was envisaged in terms of the detrimental effect on advertising strategies in the long run. Doubts have also continued to exist whether black advertising would be economically profitable and, lead to the realisation of greater product sales, within a segment of consumers essentially in the low income groups (Bauer and Cunningham, 1970; Wheatley, 1970).

White businesses have therefore advertised to ethnic groups more with restraint than enthusiasm, with the selection of ad-layouts dependent, more on the impact of various pressure groups demanding black visibility, than on any coherent policies.

A tenuous and unstable equilibrium has similarly characterised the balance of forces dictating the visibility given to Asian and West Indian ethnic groups in the UK.

The analysis here, was therefore directed at identifying the differential impact of culturally oriented ad-appeals as they affect the existing status quo, with regard to its political and economic impact on advertising policies.

PART 1

SECTION 8:1

EMPIRICAL EVIDENCE ON ETHNIC ADVERTISING

Three sets of studies were conducted. These were:-

1. A Comparative Analysis of Asian ethnic and white groups, on mean ad-ratings
2. A Comparative analysis of West Indian ethnic and white groups, on mean ad-ratings
3. Analyses of the 'integrated', 'ethnic' and 'car-only'

ads, in each instance, in comparison to the 'white' ad,
for each group

Accordingly, the analyses took the following form:-

COMPARATIVE ANALYSIS OF ASIAN ETHNIC & WHITE AD RATINGS
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The Asian ethnic and white consumer groups were comparatively analysed, for differences in mean ratings given to the 20 ad related variables, with regard to each of four experimental treatments, namely:-

1. An automobile with a white model
2. An automobile in an integrated panel ad, showing Asian ethnic as well as white models
3. An automobile with an Asian ethnic model
4. An automobile as the dominant principal, in the ad-layout

COMPARATIVE ANALYSIS OF WEST INDIAN ETHNIC & WHITE AD RATINGS  
~~~~~

The West Indian ethnic and white groups were comparatively analysed, for differences in mean ratings on each of the 20 ad-related variables for two experimental treatments. These were:-

1. The automobile with a white model
2. The automobile, as the dominant principal in the ad

From a comparative analysis of these two treatments, it was

hoped to find out whether the presence of a white model had any differential impact on West Indian ethnic consumer ratings.

ANALYSIS OF 'INTEGRATED', 'ETHNIC' & 'CAR-ONLY' ADS IN
~~~~~  
COMPARISON TO THE 'WHITE' AD  
~~~~~

Analyses were performed, for the Asian, West Indian ethnic and white groups, on differences in mean ratings given to the 'ethnic', 'integrated', and 'product only' ads, each in comparison to the 'white' model ad.

The three sets of studies are next discussed in detail, for the evidence obtained on different levels of integration, as put forward in Appendices G and H.

STUDY 1
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DIFFERENCES BETWEEN ASIAN ETHNIC AND WHITE RESPONSES  
~~~~~  
FOR THE 'WHITE' AD
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The 'white' ad was attributed significantly more positive, higher average ratings by the Asian ethnic, in comparison to the white group, on 12 of the 20 ad-items (Appendix G:2), namely 2,4,5,6,9,10,11,14,16,17,18 and 19, or, item 2 ('bad-good'),  $p < .10$ , item 4 ('poor-outstanding'),  $p < .05$ , item 5 ('ugly-beautiful'),  $p < .001$ , item 6 ('unfriendly-friendly'),  $p < .10$ , item 9 ('uninteresting-interesting'),  $p < .01$ , item

10 ('unappealing-appealing'),  $p < .05$ , item 11 ('unimpressive-impressive'),  $p < .05$ , item 14 ('confusing-clear'),  $p < .10$ , item 16 ('unrealistic-realistic'),  $p < .05$ , item 17 ('meaningless-meaningful'),  $p < .05$ , item 18 ('unsophisticated-sophisticated'),  $p < .01$ , and item 19 ('undignified-dignified'),  $p < .01$ . Differences were not statistically significant for item 1 ('unpleasant-pleasant'), item 3 ('disorderly-orderly'), item 7 ('not for me-for me'), item 8 ('would like to see less-would like to see more'), item 12 ('unattractive-attractive'), item 13 ('uninformative-informative'), item 15 ('not eyecatching-eyecatching'), item 20 ('masculine-feminine') and, therefore, only speculative. The overall response elicited on the 'white' ad for both, the Asian ethnic and white groups was, however, towards the positive end of the scale.

DIFFERENCES BETWEEN ASIAN ETHNIC AND WHITE RESPONSES  
FOR THE 'INTEGRATED' AD

The 'integrated' ad was accorded a significantly higher rating of 5.51, by the Asian ethnic group, in comparison to that of 3.90 for the white group ( $p < .001$ ). Asian ethnic mean ratings were significantly higher (Appendix G:3), on items 2,3,4,5,7,8,9,10,11,13,14,15,17,18,19 and lower on item 20. However, differences were not observed as significant on item 1 ('unpleasant-pleasant'), item 6 ('unfriendly-friendly'), item 12 ('unattractive-attractive'), and item 16 ('unrealistic-realistic'). Thus, while the integrated panel

ad elicited a positive affect from both the Asian ethnic as well as white respondent groups; the response was significantly more positive in the case of the Asian ethnic group.

DIFFERENCES BETWEEN ASIAN ETHNIC AND WHITE RESPONSES  
FOR THE 'ETHNIC' AD

The 'ethnic' ad was attributed a significantly more positive, higher average rating of 5.91 by the Asian ethnic group, compared to a rating of 4.73 by the white group. Ad-ratings on individual items (Appendix G:4), indicated that, the Asian ethnic group gave significantly higher ratings in comparison to the white group on 8 of the ad-related variables, namely 4,7,8,9,10,14,16,17, and lower on item 20. Significance levels for these items were: item 4 ('poor-outstanding'),  $p < .01$ ; item 7 ('not for me-for me'),  $p < .01$ ; item 8 ('would like to see less-would like to see more'),  $p < .01$ ; item 9 ('uninteresting-interesting'),  $p < .01$ ; item 10 ('unappealing-appealing'),  $p < .10$ ; item 14 ('confusing-clear'),  $p < .001$ ; item 16 ('unrealistic-realistic'),  $p < .001$  and item 17 ('meaningless-meaningful'),  $p < .01$ . The ethnic response rating for item 20 ('masculine-feminine'),  $p < .001$ , indicated that the ad was attributed significantly less feminine connotations, in comparison to the 'white' ad.

On an overall assessment, the Asian ethnic group rated the 'all ethnic' ad as significantly more 'outstanding',

'relevant', 'likeable', 'interesting', 'appealing', 'clear', 'realistic', and 'meaningful'. Nevertheless, the ethnic ad could be considered to have elicited a positive response from both, the Asian ethnic and white groups.

DIFFERENCES BETWEEN ASIAN ETHNIC AND WHITE RESPONSES  
~~~~~  
FOR THE 'PRODUCT ONLY' AD
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The 'car-only' ad was given a significantly more positive and higher rating of 5.68, by the ethnic group, in comparison to an average rating of 4.93 by the white group (Appendix G:5).  
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Mean ratings by the Asian ethnic group were significantly more positive on 6 of the 20 ad-items or, more specifically, item 4 ('poor-outstanding'), $p \leq .001$, item 13 ('uninformative-informative'), $p \leq .01$, item 14 ('confusing-clear'), $p \leq .01$, item 17 ('meaningless-meaningful'), $p \leq .10$, item 18 ('unsophisticated-sophisticated'), $p \leq .10$ and item 19 ('undignified-dignified'), $p \leq .05$.

In comparison to the white group, the 'car-only' ad was therefore perceived by the Asian ethnic group, as significantly more 'outstanding', 'informative', 'clear', 'meaningful', 'sophisticated' and 'dignified'. The overall response elicited by both, the Asian ethnic and white groups was, nevertheless, towards the positive end of the semantic scale.

STUDY 2 ~~~~~

DIFFERENCES IN WEST INDIAN ETHNIC AND WHITE RESPONSES ~~~~~ FOR THE 'WHITE' AD ~~~~~

The West Indian ethnic group gave the 'white' model ad a lower, less positive average rating of 4.39, compared to a rating of 4.50 by the white group (Appendix G:6). The difference in the above mean ratings was, however, not found statistically significant, and could, therefore, again be considered only speculative.

Mean ratings by the West Indian ethnic group were higher, though not significantly, on 9 ad-variables, namely items 1,2,5,6,9,10,12,13,16. The difference in ratings by the West Indian ethnic and white respondents for these items, indicated a statistical significance only in the case of item 16 ('unrealistic-realistic'), $p < .10$.

Mean item ratings by the West Indian ethnic group were significantly less positive and lower, for 3 of the 20 ad-items, namely item 3 ('disorderly-orderly'), $p < .10$, item 4 ('poor-outstanding'), $p < .10$ and item 14 ('confusing-clear'), $p < .10$. The West Indian ethnic group thus perceived the 'white' ad as less 'outstanding', more 'disorderly' and more 'confusing'.

On an overall basis, however, West Indian ethnic and white

responses were, in both cases, towards the positive end of the semantic scale.

DIFFERENCES IN WEST INDIAN ETHNIC AND WHITE RESPONSES

FOR THE 'PRODUCT ONLY' AD

The West Indian ethnic group attributed to the 'car-only' ad, a less positive, though not significantly lower rating of 4.76, compared to a mean rating of 4.93, by the white group (Appendix G:7).

Despite the lower average rating, mean responses were significantly more positive for items 3,6,13 and 14, or, in detail, item 3 ('disorderly-orderly'), $p < .05$, item 6 ('unfriendly-friendly'), $p < .01$, item 13 ('uninformative-informative'), $p < .01$, and item 14 ('confusing-clear'), $p < .05$, and significantly less positive on item 1 ('unpleasant-pleasant'), $p < .10$, item 7 ('not for me-for me'), $p < .01$, item 15 ('not eyecatching-eyecatching'), $p < .10$ and item 20 ('masculine-feminine'), $p < .10$.

While the mean rating elicited for the 'car only' ad by the West Indian ethnic group, was less favorable compared to that for the white group, both responses were, nevertheless, towards the positive end of the scale.

STUDY 3

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#### WHITE RESPONSES

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DIFFERENCES IN WHITE RATINGS FOR THE 'INTEGRATED'

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#### AND 'WHITE' ADS

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An assessment of overall responses for the 20 ad related variables indicated, that the white group attributed to the 'integrated' ad, a lower average rating of 3.90, in comparison to that of 4.51 for the 'white' ad (Appendix G:8). Strikingly however, the difference in average ad ratings was not statistically significant. A comparison of mean ratings over each ad-item, indicated that the 'integrated' ad elicited higher, more positive, though not necessarily significant ratings than the 'white' ad on five items, namely 1,5,6,12 and 20.

The 'integrated' ad was thus regarded by the white group as more 'pleasant', 'beautiful', 'friendly', 'attractive' and 'feminine'. Of these, only one, namely item 6 ('unfriendly-friendly'), was significantly more positive. For the 15 items on which the 'integrated' ad scored less in comparison to the 'white' ad, four items, 4,10,11 and 14 were rated as significantly lower. In detail, these were item 4, 'poor-outstanding' ($p < .05$), item 10, 'unappealing-appealing' ($p < .10$), item 11 'unimpressive-impressive', ($p < .10$), item 14, 'confusing-clear' ($p < .05$). On the eleven remaining items,

differences between 'integrated' and 'white' ads, were not estimated as statistically significant and, hence, only speculative.

An overall consideration of lower item ratings indicated that, in comparison to the 'white' ad, the 'integrated' ad was thus regarded by the white group as less 'realistic', 'less 'meaningful' and significantly less 'clear' (all cognitive dimensions). It was also considered not as 'good', less 'orderly', significantly less 'outstanding', 'less 'relevant', less 'likeable', less 'interesting', significantly less 'appealing' or 'impressive', less 'informative', less 'eye catching', less 'sophisticated' and less 'dignified' (affective dimensions).

In terms of the general directional unanimity as evidenced by white group ratings on the ad items, the 'integrated' ad could only be considered more negative than positive, when compared to the 'white' model ad. Thus, while it was considered a 'good' ad on affective dimensions, especially item 6 ('unfriendly-friendly'), it was also considered by the white group to be a 'poor' ad, on cognitive dimensions.

DIFFERENCES IN WHITE GROUP RATINGS FOR THE
~~~~~  
'ETHNIC' AND 'WHITE' ADS  
~~~~~

The white group attributed to the 'ethnic' ad, a higher, more positive average rating of 4.73, compared to that of 4.51 for

the 'white' model ad (Appendix G:9). The difference in average ad ratings was not statistically significant. (This was also evidenced in the case of the 'integrated' ad rating). The 'ethnic' ad thus appears to have elicited from the white group, more positive feelings than any negative attitude, and was not perceived as significantly different in its overall ad effectiveness.

Specifically, higher, more positive ratings were accorded on 14 ad-items, of which only three, item 5 ('ugly-beautiful') item 6 ('unfriendly-friendly') and 20 ('masculine-feminine') were significantly more positive. A consideration of the remaining 11 items indicated that the positive reaction was evoked primarily by those items recognised as contributing to the affective component, so that the 'ethnic' ad was regarded as more 'pleasant', 'good', 'outstanding', 'beautiful', 'friendly', 'attractive', 'interesting', 'appealing', 'impressive', 'eye catching', 'sophisticated', 'dignified' 'feminine' (affective dimensions), and also more 'informative' (a cognitive dimension).

Significantly lower and more negative mean ratings were obtained on item 14 ('confusing-clear') with $p < .01$, and item 16 ('unrealistic-realistic'), with $p < .01$. In addition to the negative affect engendered by these latter two item ratings, the 'ethnic' ad was also perceived as slightly less 'orderly', and scored lower on item 7 ('not for me-for me') and item 8 ('would like to see less-would like to see more'),

and was less 'meaningful' (again cognitive dimensions). The overall positive affect elicited by the ad was obviously a result the affective, rather than cognitive ad-items.

DIFFERENCES IN WHITE GROUP RATINGS FOR THE 'PRODUCT ONLY'
AND 'WHITE' ADS

The white group gave to the 'car-only' ad, a higher, more positive average rating of 4.93 in comparison to the 'white' ad rating of 4.51 (This was similar to the more positive rating evoked by the 'ethnic' ad). The difference in mean ad ratings was, however, not statistically significant (Appendix G:10). Specifically, the 'car-only' ad received higher, positive ratings on 15 items in comparison to to the 'white' ad. Only item 9 ('uninteresting-interesting'), was significantly higher, with $p < .10$. Additionally, item 20 ('masculine-feminine'), $p < .01$, indicated a difference in mean ratings where the 'car-only' ad had significantly less feminine connotations.

On an overall assessment, the 'car-only' ad was considered slightly more 'pleasant', 'good', 'orderly', 'beautiful', 'relevant', 'likeable', 'interesting', 'appealing', 'impressive', 'attractive', 'informative', 'realistic', 'meaningful', 'sophisticated' and 'dignified', but also less 'outstanding', 'friendly' or 'eyecatching', indicating that the net positive affect was elicited, on the basis of cognitive as well as affective ad dimensions.

ASIAN ETHNIC RESPONSES

DIFFERENCE IN ASIAN ETHNIC RATINGS FOR THE 'INTEGRATED' AND 'WHITE' ADS

The Asian ethnic group gave the 'integrated' ad a higher average rating of 5.51, compared to a rating of 5.40 for the 'white' ad (Appendix G:11). The difference in ad-ratings was not, however, statistically significant.

The 'integrated' ad was accorded higher, more positive ratings in comparison to the 'white' ad, on 13 of the 20 ad-items. Of these, the difference in ratings was statistically significant for only 4 ad variables, item 7 ('not for me-for me'), $p < .05$, item 8 ('would like to see less-would like to see more'), with $p < .01$, and item 13 ('uninformative-informative'), with $p < .05$ and item 17 ('meaningless-meaningful'), $p < .001$. The 'integrated' ad was thus considered slightly more 'pleasant', 'orderly', 'outstanding', 'beautiful', 'friendly', 'relevant', 'likeable', 'appealing', 'attractive', 'informative' and 'eye catching', (affective dimensions), and also more 'meaningful', 'dignified' (the former, a cognitive dimension), than the 'white' model ad.

However, it evoked lower ratings and, was considered less 'good', 'interesting', 'impressive', 'clear', 'realistic', 'sophisticated', or 'feminine' (mainly cognitive dimensions).

These findings indicate that the ad elicited lower ratings on cognitive dimensions, but an overall positive response mainly due to higher ratings on affective dimensions.

DIFFERENCES IN ASIAN ETHNIC RATINGS FOR THE 'ETHNIC'
~~~~~  
AND 'WHITE' ADS  
~~~~~

The Asian ethnic group attributed to the 'ethnic' ad, a significantly higher average rating of 5.91, compared to a rating of 5.41 for the 'white' ad (Appendix 12). A consideration of individual ad items indicated that the 'ethnic' ad elicited more positive ratings on 19 of the 20 ad items. Eleven of these, namely items 1,4,5,7,8,9,10,13,15,17 and 19 were significantly more positive.

In particular, they were item 1 ('pleasant-unpleasant'), $p < .10$, item 4 ('poor-outstanding') with $p < .05$, item 5 ('ugly-beautiful'), $p < .05$, item 7 ('not for me-for me'), $p < .001$, item 8 ('would like to see less-would like to see more'), $p < .001$, item 9 ('uninteresting-interesting'), $p < .01$, item 10 ('unappealing-appealing') $p < .05$, item 13 ('uninformative-informative'), $p < .10$, item 15 ('not eye catching-eye catching'), $p < .001$, item 17 ('meaningless-meaningful'), $p < .05$ and item 19 ('undignified-dignified'), $p < .001$. The ad was also rated as slightly 'better', more 'orderly', 'friendly', 'impressive', 'attractive', 'clear', 'realistic', and 'sophisticated'. These latter differences were, however, not significant and, therefore merely speculative.

Further, a significantly lower rating was obtained on item 20 ('masculine-feminine'), with $p < .05$, where the 'ethnic' ad was regarded as less 'feminine' (and more towards the 'masculine' end of the scale), in comparison to the 'white' model ad. An overall consideration of ratings on individual ad-items in the item pool, serves to indicate that the 'ethnic' ad elicited a net positive reaction, that was significantly higher than obtained for the 'white' ad.

DIFFERENCES IN ASIAN ETHNIC RATINGS FOR THE
~~~~~  
'PRODUCT ONLY' AND 'WHITE' ADS  
~~~~~

The Asian ethnic group gave the 'car-only' ad, a significantly more positive, higher rating of 5.68, compared to a rating of 5.41 for the 'white' ad ($p < .05$) (Appendix G:13). Higher and more positive mean ratings were attributed specifically to 15 of the 20 ad items, of which 10 were statistically significant. In detail, they were items 3,4,7,8,12,13,14,15,17 and 19, or, item 3 ('disorderly-orderly'), $p < .01$, item 4 ('poor-outstanding'), $p < .10$, item 7 ('not for me-for me'), $p < .001$, item 8 ('would like to see less-would like to see more'), $p < .001$, item 12 ('unattractive-attractive'), $p < .01$, item 13 ('uninformative-informative') $p < .001$, item 14 ('confusing-clear'), $p < .05$, item 15 ('not eye catching-eye catching'), $p < .10$, item 17 ('meaningless-meaningful'), $p < .10$ and item 19 ('undignified-dignified'), $p < .10$.

The 'car-only' ad was rated as lower and less positive than the white ad on items 5, 6 and 20, though the difference was only statistically significant for the latter two items. It was thus considered less 'beautiful', significantly less 'friendly' than the white ad, and also less 'feminine', but on an overall consideration, received a higher rating mainly due to its cognitive affect.

WEST INDIAN ETHNIC RESPONSES

DIFFERENCES IN WEST INDIAN ETHNIC RATINGS FOR THE 'PRODUCT ONLY' AND 'WHITE' ADS

The West Indian ethnic group gave the 'car-only' ad a significantly more positive and higher average rating of 4.76, compared to a rating of 4.39 for the 'white' ad (Appendix G:14).

Specifically, mean ratings were higher on 13 of the 20 ad variables, namely items 3,4,5,6,7,8,9,10,11,13,14,18,19 and lower on item 20. However, average ratings were significantly higher only in the case of six, i.e. item 3 ('disorderly-orderly'), $p < .001$, item 11 ('unimpressive-impressive'), $p < .01$, item 13 ('uninformative-informative'), $p < .10$, item 14 ('confusing-clear'), $p < .001$, item 18 ('unsophisticated-sophisticated'), $p < .10$, item 19 ('undignified-dignified'), $p < .10$, and significantly lower on item 20 ('masculine-feminine'), $p < .001$. Nevertheless, a

consideration of all items in the item pool indicated, that the 'car-only' ad elicited a more positive reaction from the West Indian ethnic group, in comparison to that evoked by the 'white' ad.

INTERACTION OF AD APPEAL WITH ETHNIC ORIGIN, RELIGION
AND GENDER

The profile comparisons provided by mean ad-ratings for the four ad layouts, permitted insights into the average response patterns for the Asian and West Indian ethnic and white groups, as discussed above. An analysis of variance was further conducted, in order to investigate the underlying factors contributing to group differences in attitudinal response ratings.

It therefore tested, firstly, for the differential impact of ethnic origin, gender and the ethnic religions on ad-responses elicited for the three consumer groups and, secondly, for the interaction of the ad layouts with these three variables. Three sets of data were obtained, as indicated below:-

INTERACTION OF AD APPEAL WITH ETHNIC ORIGIN & GENDER
FOR THE ASIAN, WEST INDIAN ETHNIC & WHITE GROUPS

An analysis of variance was performed to test for the impact of ethnic origin on ad appeal:-

TABLE 8:1

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## ANALYSIS OF VARIANCE

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FOR ASIAN AND WEST INDIAN ETHNIC & WHITE GROUPS

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<u>SOURCE OF VARIATION</u>	<u>SUM OF SQUARES</u>	<u>DF</u>	<u>MEAN SQUARE</u>	<u>F</u>	<u>SIG. OF VARIANCE</u>
AD LAYOUT	33622.2	6	5603.7	20.54	.001
ETHNIC ORIGIN	4676.7	2	12917.6	47.34	.001
GENDER	148.2	1	148.2	.54	.46
2 WAY INTERACTION	4523.1	8	565.3	2.07	.04
AD LAYOUT X ORIGIN	2653.2	4	663.3	2.43	.05
AD LAYOUT X GENDER	2298.2	3	766.1	2.80	.04
ORIGIN X GENDER	206.1	1	206.1	0.70	.38
3 WAY INTERACTION	428.2	2	214.1	.78	.45
AD LAYOUT X ORIGIN X GENDER	428.2	2	214.1	.78	.45

The evidence indicated that ad layouts significantly affected attitudinal responses for the Asian and West Indian ethnic groups, as well as for the white group ( $p < .001$ ). Specifically:-

1. Ethnic origin had a significant main effect on attitudinal responses ( $p < .001$ ,  $F=47.34$ ), for the Asian and West Indian ethnic groups.
2. However, respondent gender did not seem to significantly affect ad response.
3. There was a significant two-way interaction between ethnic origin and ad layout, with  $p < .05$ , in shaping

attitudinal responses elicited by the ad appeals.

4. There was also a significant two-way interaction between respondent gender and ad layout, in governing ad responses at varying levels of integration.

#### INTERACTION OF AD APPEAL WITH GENDER

##### IN THE WHITE GROUP

This was conducted, in order to test whether there was any variation in attitudinal response ratings due to respondent gender with regard to the four ad layouts, i.e. the 'white', 'integrated', 'ethnic' and the 'product only' ads (Table 8:2).

TABLE 8:2

#### ANALYSIS OF VARIANCE FOR THE WHITE SEGMENT

<u>SOURCE OF VARIATION</u>	<u>SUM OF SQUARES</u>	<u>DF</u>	<u>MEAN SQUARE</u>	<u>F</u>	<u>SIG. OF VARIANCE</u>
MAIN EFFECTS	3907.4	4	976.9	1.76	.15
AD LAYOUT	3598.3	3	1199.4	2.16	.10
GENDER	280.7	1	280.7	0.51	.48
2 WAY INTERACTIONS	1554.6	2	777.3	1.40	.25
AD LAYOUT X GENDER	1554.6	2	777.3	1.40	.25

The results indicated that within the white group, respondent gender did not affect ad-ratings significantly. However, ad

appeal served as an independent variable across the four ad-layouts, to significantly affect ad responses ( $F=2.16$ ,  $p < .10$ ), within this group.

INTERACTION OF AD APPEAL WITH RELIGION & GENDER  
~~~~~  
IN THE ASIAN ETHNIC GROUP
~~~~~

An analysis of variance was conducted on the Asian ethnic group, to test for the interaction of ad layout, gender, and ethnic religion, in affecting attitudinal response ratings for the four ad layouts, as shown in Table 8:3 below.

TABLE 8:3  
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ANALYSIS OF VARIANCE FOR THE ASIAN ETHNIC SEGMENT
~~~~~

<u>SOURCE OF VARIATION</u>	<u>SUM OF SQUARES</u>	<u>DF</u>	<u>MEAN SQUARE</u>	<u>F</u>	<u>SIG. OF VARIANCE</u>
MAIN EFFECT	3045.57	6	507.6	2.70	.015
AD LAYOUT	2830.4	3	943.4	5.10	.002
RELIGION	114.2	2	57.1	0.30	.74
GENDER	58.6	1	58.6	0.31	.58
2 WAY INTERACTION	4568.4	11	415.3	2.23	.015
AD LAYOUT X RELIGION	2603.1	6	433.8	2.32	.035
RELIGION X GENDER	865.0	3	288.3	1.54	.035
3 WAY INTERACTION	2376.6	4	594.1	3.20	.015
AD LAYOUT X RELIGION X GENDER	2376.6	3	594.1	3.20	.015

The results indicated that within the Asian ethnic group:-

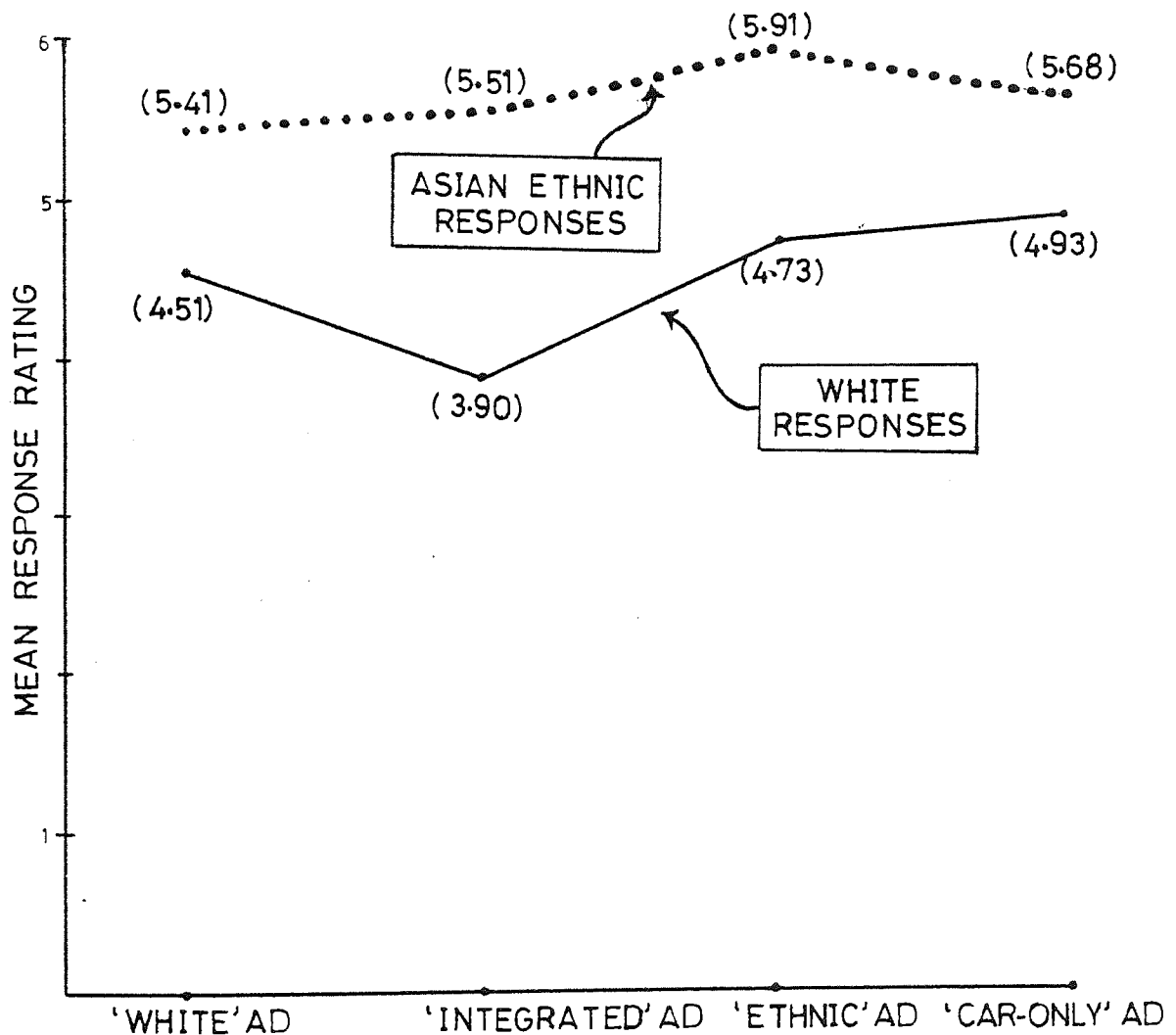
1. Respondent gender, as a main effect, did not significantly affect attitudinal responses to ad-layouts.
2. Religion as a demographic main effect, did not significantly affect attitudinal response ratings for the four ad-layouts.
3. Ad appeal did significantly affect ad responses, at a .01 level.
4. The ad appeal (in terms of level of integration signified by the ad layout), interacted significantly with respondent religion ( $p < .05$ ), and also with gender ( $p < .05$ ), in affecting attitudinal response ratings.
5. There was a significant three-way interaction between ad layout, religion and gender ( $p < .05$ ), in eliciting favorable ad responses.

From the above data, it is obvious that ethnic origin interacted significantly with ad layouts, so that the ethnic appeal generated via the 'ethnic' model ad, elicited a significantly higher rating, in comparison to ad layouts at other levels of integration. Differences in cultural orientation, moreover, can be considered responsible for consistently higher mean ratings assigned by the Asian ethnic group, in the case of all ad layouts.

The exposure curve in Figure 8:1 overleaf, graphically depicts the interaction of ad layouts with the ethnic origin of the groups, as shown by the mean response data, before going on to the inferences.

FIGURE 8:1

INTERACTION OF AD LAYOUT WITH ETHNIC ORIGIN



KEY: WHITE RESPONSES —  
 ASIAN ETHNIC RESPONSES .....

SOURCE: Adapted from 'Effects of Different Levels of Integration as Advertising Preference and Intention to Purchase', Syzbillo, G.J. and Jacoby, J., (1974), Journal of Applied Psychology, Vol.59, No.3, p.276-277

## PART 2

### INFERENCES FROM ETHNIC ADVERTISING

The evidence in the previous section, advanced some interesting perspectives on the attitudinal responses evoked by the alternative ad layouts, for the Asian and West Indian ethnic and white groups. The inferences for each of the four ad layouts with regard to their differential impact, are discussed in detail below.

#### SECTION 8:2

##### DIFFERENTIAL EFFECTIVENESS OF THE 'WHITE' AD

Responses elicited, had taken a form, where white respondents gave the 'white' ad a mean rating of 4.51, this being lower than the ratings assigned for the 'ethnic' (4.73), as well as 'car only' (4.93) ads, but higher than the mean rating of 3.90 for the 'integrated' ad. None of the differences were, however, statistically significant, and, therefore, only tentative in their implications, for the differential appeal evoked by this ad layout.

Asian ethnic respondents had given the 'white' ad a mean rating of 5.41, lower than those assigned to the three alternative ad treatments, i.e., the 'integrated' (5.51), 'ethnic' (5.91), and 'car-only' (5.68) ads. In particular,



it had been rated significantly lower and less positive than the 'ethnic' ( $p < .001$ ), and 'car only' ( $p < .05$ ) ads, though the difference in mean ratings was not statistically significant in comparison to the 'integrated' ad. Along similar lines, the West Indian ethnic group gave the 'white' ad a mean rating of 4.39, lower than the rating of 4.76 for the 'car-only' ad.

Comparing the Asian ethnic and white groups, it had further been found that, for the 'white' ad, the Asian ethnic rating of 5.41 was significantly higher than the white response of 4.51, with  $p < .01$ . A similar significance in response was not observed between the West Indian ethnic (4.39), and white (4.51) groups.

From these differences it was inferred that, the 'white' ad was the least preferred by the Asian, and also the West Indian ethnic groups. In the case of the white consumer group, it was more preferred than the 'integrated' ad, but less favorably considered than the Asian 'ethnic', as well as 'car-only' ads.

An assessment of the differential impact of these alternative ad appeals highlights their similarity to the use of black models in promotional material targeting black and white American audiences, and for which a well defined body of research on black/ethnic advertising has evolved, since the mid-1960's.

Since black consumers constitute the largest ethnic segment in the US market, the debate revolved essentially round the use of black models in promotional material directed at majority white audiences. Three major advertising strategies, were the focal point of the research. First, traditional advertising strategy, based on featuring only 'white' models in ads directed at general mass media audiences, utilised the assumption that Negroes would also be reached at the same time. This approach was supported on the argument that, the generally high status of whites causes advertisements featuring 'white' models, to be favorably evaluated by black audiences (Wheatley, 1977). Empirical findings by Barban and Cundiff, 1964, confirm the fact that black and white consumers give similar responses to advertisements intended for white audiences.

A second approach has drawn on the concept of 'segregated advertising', with advertisements using black models, targeting black audiences via Negro media. This was based on the belief that, Negroes would be more attracted to advertisements with Negro models, than to similar ads featuring white models. As a policy approach, the latter strategy has come under increasing attack, in that it implies the moral and social exclusion of blacks, from advertisements aimed at the larger society. A third approach has attempted to resolve this controversial stance, by envisaging the idea of 'integrated advertisements', featuring both black and white models in the same ad layout.

On this basis, previous research studies have elicited response data from white and black consumers, on different levels of integration in ad layouts. While the present research differed from earlier research in the use of an Asian 'ethnic', rather than Negro model, it was based on a similar principle of giving visibility to a minority group, which the dominant white consumer market is not familiar with.

The present findings had further indicated that, with regard to specific ad items, the 'white' ad was considered by the white group as significantly more 'outstanding' (item 4), 'appealing' (item 10), 'impressive' (item 11), and as having greater 'clarity' (item 14), than the 'integrated' ad. In comparison to the 'ethnic' ad, it was perceived as significantly more 'clear' (item 14) and also more 'realistic' (item 16). However, it was not significantly more positively rated in comparison to the 'car-only' ad, on any specific items except 'femininity' (item 20). Notwithstanding its greater realism and clarity, the results of the study thus substantiated previous research which indicates that white consumers do not differ significantly, at least in overall reactions to 'all-white' or 'integrated' ads (Barban, 1964; Barban and Cundiff, 1964; Guest, 1970; Schlinger and Plummer, 1970; Bush, Gwinner and Solomon, 1974).

Again, the higher, (though not statistically significant)

response to the 'white', in comparison to the 'integrated' ad, substantiated findings by Cagley and Cardozo, 1970, where white responses to 'all white' ads were found to be significantly more positive, compared to ads with black models, especially when responses were obtained from highly prejudiced white consumers. Higher ratings for 'all white' ads have also been obtained for ad layouts including personal products such as lipsticks, (Muse, 1971), and products that are socially conspicuous such as automobiles (Solomon and Bush, 1977). In addition, elaborate techniques employing pupil response measures also recorded positive white responses in the instance of automobile product ads (Stafford, Birdwell and Van Tassell, 1970).

In the light of the existing and present research findings, it can be inferred that, despite the preferential response by white consumers to 'all-white' ads, the differences in ratings compared to alternative ad layouts, could not be considered significant, and therefore only speculative.

Ethnic responses to the 'white' ad, were less ambiguous than the white group. A comparison of Asian ethnic and white group ratings indicated that, the response by the Asian ethnic group was in a direction, estimating it as significantly 'better' (item 2), more 'outstanding' (item 4), 'beautiful' (item 5), 'friendly' (item 6), 'interesting' (item 9), 'appealing' (item 10), 'impressive' (item 11), 'clear' (item 14), 'realistic' (item 16), 'meaningful' (item

17), 'sophisticated' (item 18) and 'dignified' (item 19). These results implied that the 'white' ad elicited a positive response from the Asian ethnic group, even though it was significantly less positively rated in comparison to the alternative ad layouts.

However, when West Indian ethnic and white responses were compared, the 'white' ad was not considered by the former group, as significantly more positive on any specific ad items, except 16, where it was seen as more 'realistic'. Nevertheless, the West Indian ethnic response to the 'white' ad was slightly lower, in comparison to its rating for the 'car-only' ad.

In retrospect, both Asian and West Indian ethnic groups thus considered the 'white' ad as significantly more 'realistic' (item 16), than the white group. Even so, the Asian ethnic response was significantly lower compared to that for the 'ethnic' model ad. These findings confirm previous research on black consumers, which also recorded significantly lower ratings to all-white ads compared to ads with black models (Syzbillo and Jacoby, 1974).

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Taken together, the findings on the Asian and West Indian ethnic and white groups implied that, ads with 'all white' models were less preferred, though still positively rated.

SECTION 8:3

DIFFERENTIAL EFFECTIVENESS OF THE 'INTEGRATED' AD

Major among the aspects of the 'integrated' ad responses, were the fact that the white group had given the 'integrated' ad a mean rating of 3.90, which was lower, though not significantly, than the mean rating of 4.51 for the 'white' ad. It was also lower than the ratings of 4.73 and 4.93 for the 'ethnic' and 'car-only' ads. In contradistinction, the Asian ethnic group had given the 'integrated' ad a mean rating of 5.51, which was higher, though not significantly, than the 'white' ad rating of 5.41, but lower than those of 5.91 and 5.68 for the 'ethnic' and 'car-only' ad treatments.

These results indicate that the 'integrated' ad was considered less favorably in comparison to the 'ethnic' and the 'car-only' ads, by both the Asian ethnic and white groups, even though not significantly different from the 'white' ad. Strikingly, the slightly higher ratings by the Asian ethnic group for the 'integrated', in comparison to the 'white' ad, were consistent with parallel research using Negro models in integrated ad settings (Bullock, 1961; Barban and Cundiff, 1964; Barban, 1969; Orpen, 1975), where it was found that Negroes preferred 'integrated' ads, because they wanted to be identified with society as a whole.

Research findings on white consumer responses to integrated

ad settings, also demonstrated that white audiences do not react negatively to black models (Barban, 1969). Similar results were reported in findings by Guest, 1970, who did not obtain any negative reactions from white respondents, despite the manipulation of social deference in integrated ad settings. Confirmation for the neutrality to black models is obtained in research (Bush, Hair and Solomon, 1979; Goett, 1972; Schlinger and Plummer, 1972; Syzbillo and Jacoby, 1974; Solomon and Bush, 1977), which indicated that white consumers do not respond negatively to black models per se, but did respond differently from black consumers, when levels of integration were manipulated in integrated ad layouts. An investigation of the influence of black promotional models directly on purchase patterns, rather than merely attitudes, indicated that purchasing levels (Bush, Gwinner and Solomon, 1974; Bush and Hair, 1977), remain unaltered for white and black consumers, whether promotional displays used are 'white', 'black' or 'integrated'.

A handful of studies, nevertheless, present findings contrary to the above, and report negative responses among white groups, to black models in advertisements (Stafford, Birdwell and Van Tassell, 1970; Muse, 1971; Block, 1972). More particularly, Cagley and Cardozo, 1970 found that white respondents could be divided into high and low prejudiced segments, with low prejudiced groups evaluating 'white' as well as 'integrated' ads favorably, while high prejudiced subjects evaluated advertisements containing black models

negatively. On the basis of this theorising it has been postulated that, marketers are bound to precipitate a 'white backlash' that would only affect advertising policies adversely in the long run, since a lowering of sales response by high prejudiced whites would not be offset by the unchanged purchasing patterns of liberal white consumers, which might remain the same.

Despite the minor inconsistencies engendered via existing studies, the main body of the research literature has, none the less, reported neutral white reactions to the inclusion of black models, in either 'integrated' or 'all ethnic' ad formats.

The neutral reactions of black consumers to integrated settings have been explained on the basis of Festinger's 'social comparison theory' (Bullock, 1961, Barban, 1969; Bauer and Cunningham, 1970; Orpen, 1975), according to which there exists a unidirectional drive upward in evaluation, as well as a self-evaluation process based on comparison with other people, when objective standards are unavailable. Consequently, it has been hypothesised that, since the social comparison process is central to the mechanism underlying the evaluation of models in advertised layouts, it follows that integrated ads can be considered to have a favorable impact, on the assumption that the reference groups of middle and upper income blacks are white.

A significant aspect of the present research was, that the 'integrated' ad was given a lower response rating in comparison to the 'white' ad by white respondents, but a higher rating compared to the 'white' ad, by the Asian ethnic group. This implied that white consumers constitute a group, not as yet acclimatised to the concept of integrated advertising. Similar inferences can be drawn for the Asian ethnic group, which accorded higher ratings for the 'integrated', in comparison to the 'white' ad, on item 7 ('for me-not for me'), item 8 ('would like to see more-would like to see less'), item 13 ('uninformative-informative'), and item 17 ('meaningless-meaningful'). Yet, the overall lower rating elicited for the same ad in comparison to the 'all ethnic' ad on the other hand, implied, that integrated ad layouts evoke as yet, more surprise than segregated ad layouts, by both white and ethnic consumers. Quite obviously it followed that, to the extent integrated ads do not evoke any significantly positive affect among either Asian ethnic or white groups, they will not radically improve consumer attitudes to promoted products.

It could be tentatively suggested that, so far as integrated ad appeals attempt to extol the pluralistic virtues of integration, they are disbelieved by Asian ethnic as well as white groups, because of the prevailing cultural milieu in which they are promoted. In this context, it is important to note the negatively stereotyped media portrayal of ethnic groups within the existing cultural framework, as reported by

several researchers. This is so, especially in the case of the Negro image, depicted through the print and broadcast media. The stereotyping of Negro occupational roles was cited by Shuey, King and Griffiths, 1953, for general magazine advertisements and, again, by Pettigrew, 1965, on their existence ever since the interwar period. Thus, Pettigrew, 1965 describes how the negative situation was portrayed by the 'Life' magazine in the 1930's:-

"While occasionally portraying Negroes neutrally, or as credits to their race, ...it overwhelmingly presented them as musical, amusing, or primitive, and...in lower occupational roles..." (p.979)

These findings are substantiated further by Kassarian, 1969, who found that:-

"..While the percentage of total ads showing blacks increased, most ads depicting blacks in 1965 were for clothing and fabrics (as high fashion models), for travel and tourism (as exotic non-American blacks), or on records (as musical entertainers. ...They were conspicuously absent from heavily advertised product categories such as automobiles, detergents, soap products, ready-to-eat cereals, tooth pastes..." (p.39)

Over the past two decades, however, the media portrayal of Negro occupational roles has undergone a seemingly major shift. Thus, the advertised black has been spuriously described as occupationally upgraded into above skilled labour, nonstereotypical roles. Here, the depiction in 'above-skilled' category roles, is estimated to have risen from a proportion of 6.1% of ads portraying Negroes in

1949-1950 to 71.3% of these ads in 1967-68 (Cox, 1970).
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In particular, Cox, 1970 found that, the percentage of  
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Negroes portrayed in sports and entertainment categories,
increased from 4.7% of Negro ads in 1949-50, to 36.2% of
these ads in 1967-1968. It was noted, however, that the
majority of Negro advertisements in the entertainment
category were those showing Negroes on the album covers of
phonograph records, so that the general impression left, is
one where Negroes are accepted more readily in sports and
entertainment occupational roles, rather than any other roles
in the 'above-skilled' categories. At a detailed level of
analysis, it is evident that, such representations cannot be
considered any improvement in real terms. This is because
much of the occupational upgrading is attributable to the
rise of the record industry, rather than any heightened sense
of social consciousness by advertisers. As Colfax and
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Sternberg, 1972 asserted:-  
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"Since it cannot be 'achieved'.. , the fact that
musical talent is the predominant cultural
characteristic of blacks, has served to reinforce
the cultural stereotype, and neutralise whatever
threat might be implicit in the depiction of more
conventional roles." (p.10)

Thus, in depicting blacks in musical roles, the record
industry was described as having encapsulated them, both
occupationally and socially. As remarked yet again by Cox,
~~~~~  
1970:-  
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"... they are the merchandise of the record industry advertisers, and as such, not dissimilar from other advertised products such as soaps and automobiles. This reflects on the character of the record industry. But the fact remains, that more than half of the blacks in the ads, are shown as products to be consumed, rather than as the promoters or consumers of goods and services."
(p.33)

Yet another crucial factor propagating the negative media portrayal of ethnic, particularly black groups, is that blacks have been found, never to be portrayed singly (Cox, 1970). Variants of the 'token black' have been used instead, with blacks always portrayed as 'part' of a white group. While this accorded the former some visibility, the strategy has simultaneously focused on the underlying theme of trying to assimilate them into a large, predominantly white consumer group. The same strategy of 'group portrayal', also distinctly averted the possibility of identifying Negroes too closely with any particular product advertised (Cox, 1970). Similarly, black women and black children were found to have been used readily in ads, because they are '...more easily accommodated by advertising imagery, which, while attempting to correspond to social reality, also translates them into a form which is less threatening.'
(Colfax and Sternberg, 1972).

Again, another strategy by which the consumer magazine advertising industry has attempted to get round the portrayal of blacks in positive ad copy roles, was to portray them mainly in the non-commodity, public service groups or,

through the medium of commercial 'life insurance' or 'bank' advertisements, in all cases, as expressions of institutional interests that do not associate blacks with individual products or specific services. A similar stereotyping of blacks was evidenced in their portrayal in television commercials. Here too, it was found that while the proportion of blacks depicted in television advertisements was equivalent to that of whites, they appeared significantly more in 'public service' and 'entertainment' promotional ads, than in any consumer-oriented 'product' ads (Dominick and Greenberg, 1970; p.28).

Additionally, a consideration of the frequency and portrayal of Negroes in the entertainment media has shown that, it can be described quite aptly as taking the form of a 'U-shaped' curve (Kassarjian, 1971; p.30), according to which the 1930's and 1940's interwar period constituted one in which a 'distinctly negative stereotype was presented' (Colle, 1968). In fact the post-war II presentations have been assessed effectively as 'non-representations, in which the Negro was presented as the invisible person subject to non-recognition' (Clark, 1969), with the frequency of black portrayal undergoing a distinct decline (Shuey, 1953; Colle, 1968; Clark, 1969). This was followed by a period of 'ridicule' (Clark, 1969; Stempel, 1971). Subsequently, there has been an emphasis on greater black visibility over the 1960's and 1970's period, due to legislation requiring formal recognition of blacks. However, increases in the frequency

of black portrayal, continue to remain trivial (Kassarjian,
~~~~~  
1971). The consumer implications of this, were summed up by  
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Kassarjian, 1971, as follows:-
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"The ads that treat the Negro as an equal are so few, that the advertising industry still cannot take any particular pride in their supposedly new found social responsibility." (p.39)

The tarnished social image that has resulted from the derogatory role portrayal of blacks, leads to the conclusion that, integrated ads, in order to be effectively utilised in the achievement of social goals in the context of the wider society, require a much more realistic portrayal of black consumer roles. Quite obviously, the failure of the media in contributing to the portrayal of non-white faces as a matter of routine, has conditioned white expectations of what is normal for ethnic groups and, also, for white consumers, so that they would inevitably find it hard to accept advertisements portraying ethnic and white integrated settings.

It could be concluded that because of the cultural contrast provided, integrated ads are likely to be perceived as higher on the novelty element than 'all white' ads especially in the case of ethnic groups. Consequently the technique of integrated advertising can be lauded as significantly more beneficial in the provision of factual information and in providing more direct comparisons between cultures. Nevertheless, the effectiveness of integrated ad strategies

cannot be considered devoid of limitations. Since the contrast elements envisaged in integrated formats can evoke alienation in the presentation of attitudinally discrepant information, such promotional appeals would need to be considered in the light of the ensuing cognitive dissonance that might be engendered.

#### SECTION 8:4

#### DIFFERENTIAL EFFECTIVENESS OF THE 'ASIAN ETHNIC' AD

Inferences on the promotional effect of the 'all ethnic' ad, followed from aspects, including the fact that, the white group rating of 4.73 for the 'ethnic' ad was slightly, though not significantly higher, than the ratings of 4.51 and 3.90, for the 'all white' and 'integrated' ads, but lower than the 'car-only' ad rating of 4.93. In contrast, the Asian ethnic group had rated the 'ethnic' ad as significantly higher at 5.91, than the rating of 5.41 for the 'all white' ad, and also also higher than the 'integrated' (5.51), and 'car-only' (5.68) ad ratings. Additionally, the Asian ethnic rating of 5.91, had been found significantly higher than that of 4.73 by the white group, though the advertisement could, in the final conclusion, be considered to have elicited positive responses from both, the Asian ethnic and white groups.

These results substantiate parallel research concerning the differential impact of black models, in ads directed to black

groups, indicating that they responded more positively to 'all black' than to 'white' ads (Barban, 1969; Barban and Cundiff, 1964; Tolley and Goett, 1972). The present results were consistent with studies indicating that white consumers do not, in general, respond unfavorably to ads with black models as promotional material. The favorable affect elicited by the 'ethnic' ad was evidenced in the fact that, while the white group regarded it as significantly more 'beautiful' (item 5), 'friendly' (item 6), and 'feminine' (item 20), the Asian ethnic group rated it as significantly more 'pleasant' (item 1), 'outstanding' (item 4), 'beautiful' (item 5), 'relevant' (item 7), 'would like to see more' (item 8), 'interesting' (item 9), 'appealing' (item 10), 'informative' (item 13), 'eye-catching' (item 15), 'meaningful' (item 17) and 'dignified' (item 19), but also less 'feminine', in comparison to the 'white' ad. These findings indicated that 'all ethnic' ads would be much more effective in enhancing ad-related cognitions among Asian ethnic consumers, than ads using 'white' models.

Additionally, the positive reactions elicited by the 'ethnic' ad for white consumers as well, served to imply, as Muse, 1971 suggested in previous research, that 'all ethnic' ads that are favourably perceived by whites, should aim to communicate promotional messages through general media, rather than through different and separate media campaigns, since this would gain the attention of ethnic viewers, yet not alienate white audiences. The positive appeal generated



by the 'all ethnic' ad among Asian ethnic as well as white consumers, was thus significant in its implications, especially in view of the negatively stereotyped images (Chapter 7, Section 7:3), that have to date, been projected through white-oriented media. This was summed up by Critcher, 1975, with regard to the British scene:-

"Negative attitudes towards the blacks are influenced by the way material is presented in the mass media. It serves to perpetuate the negative perceptions of blacks and to define the situation as one of intergroup conflict..."

A number of existing studies on the presentation of Asian ethnic and black stereotypes through the British press, confirm the fact that the way cultural material is handled in the mass media, serves to perpetuate stereotypes (Klapper, 1960; McQuail, 1969; DeFleur, 1966; Halloran, 1970; Hartman and Husband, 1971; Troyna, 1981). In this context it is important to note that, the image of ethnic groups presented through British media stereotyped them mainly as a 'problem' (Hartman, 1974) to be dealt with. This has been perpetuated through both, the choice of the main subject material, as well as in the themes used therein. Thus, a content analysis of the print media indicated (Hartman, 1974; Critcher, 1975; Troyna, 1981), that the main subject material dealing in ethnic groups and race, ranges over six major topics, namely the effect of ethnic groups on 'white hostility', 'crime', 'race relations', 'immigration', 'human interest' and the 'National Front', with relatively little (less than 10%),

ethnic subject matter accorded to the topics of 'housing', 'education', 'health' and 'employment', with the themes employed, those of 'tension and conflict'. Thus, Hartman et al., 1974 describe how the subject of immigration as portrayed by the press has been dealt with, 'not simply as a matter of coloured people coming to settle, but more centrally, as a matter of keeping them out..'. Again, crime stories (Crichton, 1975), have centred on the '.. gratuitous use of ethnic origin'. 'Human interest' stories, similarly, appear to have made implicit reference to concepts of 'racial tension, overcrowded housing, instability.' While 'human interest' itself as a topic area, has been described (Troyna, 1981), as 'the extent to which the press presents members of coloured minority groups as ordinary members of society, not essentially different from other people', it was found, instead, that the prevailing themes used in these latter stories were those 'assault, murder, theft, harassment..'.  
LIBRARY

As a result they have for the most part, remained replete with cultural meanings tending to perpetuate and reinforce the negative images of black, and other ethnic groups, rather than any positive aspects. The coverage of 'cultural differences' as another minor topic area (Troyna, 1981) has again been negatively dealt with in terms of differences between ethnic and white customs, as well as ensuing clashes resulting, both, between and within the cultures.

Assessing the media representation of reality, Hartman and

Husband, 1974 describe how ethnic and white cultural differences in aspects such as religion, clothing and lifestyles, have been continuously disparaged, with ethnic groups depicted as different from the mainstream and, therefore, identified as a 'problem'. An overview of these various topic areas only confirms the fact that, the presentation of Asian and West Indian ethnic groups through the media has been rather idiosyncratically influenced by the colonial past (Halloran, 1970). This was decribed by Hartman and Husband, 1974, with regard to the presentation of negative ethnic stereotypes in the British media, as below:-

"Outmoded images... based on a colonial tradition of cartoon jokes... obtruding into the media handling of ethnic presentations; so that the elements of cultural legacy are at best, ethnocentric.... and still attempt to evoke colonial associations in a post colonial era which has become out dated, perpetuating outlooks which are antithetical to good race relations." (p.272)

The potentially damaging effects of such prevailing negative images, are further affirmed by Hartman and Husband, 1974:-

"The British cultural tradition... does contain elements derogatory to foreigners, particularly blacks. The media operate within the culture and are obliged to use cultural symbols. Hence it is.... inevitable that that they will.. perpetuate this tradition..." (p.271)

Emphatic assertions as the above, only emphasise the fact that, the way the media define ethnic images, is important in conditioning white interpretations. An important fact

providing the motivational drive for this, is that, the image of black-white strife that has characterised the American media situation since the 1960's, and its coverage in turn by the British media, has served as the model for shaping the 'black-white' confrontation situation in British media as well. Added to this situation, the use of criteria that make information newsworthy, namely 'unambiguity, meaningfulness, negativeness, consonance, continuity', has provided the framework for stereotyping ethnic images that have passed on, from the media into the mass culture.

Presented as true-to-life portrayals via the entertainment aspects of the print and visual media, such cultural indicators have consistently failed to provide scope for positive potential change. With regard to the media manipulation of the role portrayal of Asian and West Indian ethnic groups, Hartman and Husband, 1974 accordingly remarked:-

"...It is obvious that the media institutions have discriminated unconsciously in ethnic portrayal, though perhaps more from insensitivity than intent. There is no reason why these apparently unconscious assumptions... need to remain unconscious, or the unintended consequences go unrecognised, or that unwitting bias remain either unwitting, or bias. It is not inevitable that the... media ideology that defines media as passive and impartial...., reflecting but not affecting events, should hold indefinite sway." (p.280)

Despite the existence of previously portrayed negative stereotypes, the present research findings clearly indicated

that 'ethnic' ads can be more effective than hitherto expected, especially when positively oriented images of ethnic groups are used. Particularly with regard to the Asian ethnic groups, it appears evident that 'ethnic' ads will continue to act as significant anchor points, which do not strain their consumer beliefs about integrationist policies. This has important implications for advertisements addressed to ethnic markets, since it is known that material which supports social attitudes, is better remembered than that which conflicts with attitudes (Levine and Murphy, 1976; Jones and Kohler, 1977; Jones and Anashansel, 1978).

The stress on ethnic cultural cues in order to give greater coherence to ads addressed to ethnic groups implies, rather, that realistic portrayals require '...much more than token adjustments' (Kassarjian, 1971), of ethnic composition via 'integrated' ads in order to erase the undesirable stereotypical images that presently exist.

#### SECTION 8:5

#### DIFFERENTIAL EFFECTIVENESS OF THE 'PRODUCT-ONLY' AD

The relative interest evinced in the 'car-only' ad, was of particular importance in view of the absence in it of female models, in comparison to their presence as promotional material in the three alternative ad treatments.

The major response features on the basis of which inferences were drawn, included the fact that the white group had given the 'car-only' ad a rating of 4.93, higher, though not significantly, than the 'white' ad rating of 4.51 and, also higher compared to the 'ethnic' (4.73) as well as 'integrated' (3.90) ad ratings. In contrast, the Asian ethnic group had rated the 'car-only' ad, as significantly higher at 5.68, compared to ratings of 5.41 and 5.51, for the 'white' and 'integrated' ads but, none the less, lower than that of 5.91, elicited for the 'ethnic' ad. However, the West Indian ethnic group had not responded significantly differently, for either the 'car-only' or 'white' ads (4.76:4.39).

The results suggested that the 'car-only' ad elicited more positive reactions than the 'white' ad, for the Asian and West Indian ethnic groups, as well as for the white group. It was found, moreover, that in comparison to the white group, the Asian ethnic group regarded the 'car-only' ad as significantly more 'outstanding' (item 4), 'informative' (item 13), 'clear' (item 14), 'meaningful' (item 17), 'sophisticated' (item 18) and 'dignified' (item 19), while the West Indian ethnic group, on a comparable basis, rated it as significantly more 'orderly' (item 3), and 'friendly' (item 6), 'relevant' (item 7), 'informative' (item 13) and 'clear' (item 14), but rated it less 'pleasant' (item 1) and also less 'eye catching' (item 15). From the findings, it could be contended that the more positive responses for the

'car-only' ad, especially among the Asian and West Indian ethnic groups, (except for the more positive cultural cues elicited by the 'ethnic' ad), were due to positive reactions on cognitive, rather than affective dimensions.

The evidence suggested, moreover, that human principals in ads do tend to lower the degree of favorable affect towards advertisements. The fact that cognitive dimensions can mediate the attitudinal acceptance of advertisements more than affective dimensions, is supported in previous research (Greenwald, 1977; Calder, 1978), and also consistent with research by Kanungo and Pang, 1973, who found that advertisements which promoted cars with female models resulted in the formation of more unfavorable, than favorable product images, in comparison to responses evoked by 'product only' ads. In fact it was reported that, the use of human models does, in some cases, produce more negative affect, and thereby lessen attention (Rudolph, 1947; Ogilvy, 1963).

Despite this, the increasing use of human models in advertisements was noted by Klapp, 1944, who estimated an increase in female models in printed matter from 22 per cent in 1900, to 74 per cent in 1940. While the continued use by advertisers, of female models in particular, has been accounted for on the basis that they provide more meaningful social contexts for consumers, Kanungo and Pang, 1973 categorically assert that '... beliefs on the use of human models posing beside products in order to make the latter

more attractive, have been largely intuitive and far from systematic, or based on any controlled empirical evidence...' (p.172). In fact, in a critical review of this situation, Hoch, 1979, asserted:-  
~~~~~

"... If Rome was an empire maintained by diverting its plebian population with gladiator matches and circuses, our own civilisation employs professional sports, mass entertainment, consumption industries, TV shows.... Thus, the modern consumerist notion may be seen as a compromise formation between the discontent in society and the possibilities of a more liberated one which might replace it. So it is a temporary historical alternative to a possible future utopia." (p.15;153)

Another governing factor postulated to affect consumer attitudes to human models in advertisements, was the interaction between 'product-type' and 'ad-model' (Zajonc, 1960; Kanungo and Pang, 1973), where it has been asserted that individual products, depending on their features and associations, do evoke stereotyped masculine or feminine images, when perceived. The present research confirms the fact that, while the 'car-only' ad evoked a 'masculine' image (with the car being considered a predominantly 'male' product category), the car-ads with female models as promotional material, evoked distinctly 'feminine' connotations. It could therefore be inferred that, higher ratings across all three groups for the 'car-only' ad ensued from the automobile being envisaged by the majority of consumers, as a product category dominated by a male car market. It would follow that, lower ratings for all three ads with female models consistently implied a 'product-model' mismatch which is, in

any case, known to result in perceptual incongruity.

In this context, Kanungo and Pang, 1973 elaborate that, since experiencing an incongruous situation is psychologically uncomfortable, it would result in lower ad ratings for the ads with models, in contrast to those for 'product-only' ads. Nevertheless, because the ratings across all three groups were consistently towards the positive end of the semantic scale for all four ad treatments, the results can be considered to be largely product dependent. Granting this, the evidence gives every indication of a lack of cognitive consistency due to the product-model mismatch, which was significant in the case of the Asian ethnic group, and results in cognitive dissonance due to the presentation of attitude-discrepant information (Bochner and Insko, 1966; McGuire, 1964; Johnson, 1966; Festinger and Aronson, 1969; Howard and Sheth, 1969). It is reasonable to anticipate that, there occurs greater disparagement of the advertised communication, as well as a higher degree of counterargumentation due to the distraction effect, for ads with human models, than for 'product-only' ads (Festinger and Aronson, 1964).

However, these results can be considered to be product-specific. Thus, earlier research substantiates the fact that the use of a female model with one product-type may evoke an unfavorable attitude, whereas the same model with another product may cause a distinctly more favorable attitude

(Kanungo and Pang, 1973). In other words, the 'fittingness
~~~~~  
of the model' is an important aspect in generating positive  
ad affect. Consistent with this, Solomon and Bush, 1977,  
~~~~~  
found that white consumers gave less positive responses for
ads featuring black models, if the product was a socially
consumed one. Quite obviously, the situational product
context in which black models are advertised, is important in
its influence on white attitudes to black models in
promotional material.

These findings imply that, since the use of human models
detracts from the impersonality of advertised products, the
execution of 'product-only' ads would be significantly more
effective and, the reward in terms of product recognition
much greater, in attempts to communicate 'product-only'
images across subcultures based on ethnic differentiation.

SECTION 8:6 ~~~~~

THE IMPACT OF ETHNIC ORIGIN, RELIGION AND GENDER ~~~~~ ON DIFFERENTIAL SUSCEPTIBILITY TO AD APPEALS ~~~~~

ETHNIC ORIGIN ~~~~~

The evidence obtained from the mean ratings on the
differential responses evoked by the alternative ad appeals,
was further substantiated by an analysis of variance for the
Asian and West Indian ethnic and white groups. This provided

impressive support for the fact that, ethnic origin significantly affects ad ratings for the Asian and West Indian ethnic, as well as white groups. The findings implied that for the same ad layout, Asian and West Indian ethnic responses would, in each instance, differ from white responses as well as from each other. This was evidenced in the fact that Asian ethnic ratings were significantly higher than white ratings, for the 'white' ($p < .01$), 'integrated' ($p < .01$), 'ethnic' ($p < .01$), and also the 'car-only' ($p < .05$) ads. On a comparable level, there were no significant differences observed between West Indian ethnic and white ratings for the 'white' ($p = NS$), or 'car-only' ($p = NS$) ads. Consequently it was concluded that, Asian ethnic groups have a cultural predisposition to accord higher and more extreme ratings on semantic scales.

A second important aspect revealed in the variance analysis (Table 8:1), was the significant interaction between ad layout and ethnic origin, in mean responses to ad appeals at different levels of integration ($F=2.43$, $p < .05$). This implied that the 'ethnic' ad interacted with Asian ethnic 'origin' to elicit a more favorable response towards the 'ethnic', in comparison to the 'white' ad. This was also consistent with the fact that the 'ethnic' ad was accorded a significantly higher rating in comparison to the 'white' ad (5.91), by the Asian ethnic group, compared to that by the white group. Accordingly, it was concluded, that since ethnic cultural cues in ads are singled out for their

emotional content, they form the essential basis for the existence of ethnic audience segments.

The findings were further substantiated by drawing on Lacan's psychoanalytic theory as applied by Watson, 1979. According to the principles embodied in this theory, it could be deduced that, the 'integrated' ad used the principle of 'the signification of differences', in which the sameness of the product was the starting point, with the 'integrated' ad layout used to appellate the ethnic group through the ethnic panel, and the white group through the white panel, thus submerging the individuality of each group into an integrated identity, yet giving the advertised product greater flexibility in its appeal to both groups. Since, however, the 'ethnic' ad evoked a higher and more positive response in comparison to the 'integrated' ad, this would imply that integrated ads are marginally less advantageous than 'all ethnic' or 'all white' advertisements.

Using the same theory, it could be argued that ethnic appeals provide cultural frameworks which have greater staying power in comparison to non-ethnic appeals and, are, therefore, more expressive in terms of visual non verbal presentations. On this basis it was inferred that 'white' ads, no matter how successful in a general market campaign, would be less meaningful to ethnic groups. White-oriented ads directed at ethnic segments would, therefore, require the translation of ad concepts into appeals with ethnic cultural cues, in order

to elicit maximally effective ad responses.

The evidence further indicated (Table 8:3), that religion by itself did not have a significant main effect on ad ratings. However, respondent religion interacted significantly with ad appeal, to alter ad ratings within the Asian ethnic group at a 5 per cent level of significance. The existence of a significant two-way interaction between ad layout and religion, implied that, while ethnic origin is a major demographic segmenting variable, the existence of religious subsegments results in further differentiation governing attitudinal ad responses. These findings inevitably substantiate the assertion by Kotler, 1978, that sex-oriented ad appeals are disparaged, in Muslim religious subgroups being promoted to, within international markets. In this context, Kotler, 1978 elaborated on marketing communication reprogramming strategies, as follows:-

"In.. strategy extension...the company modifies its communication. For example... logic rather than fancy is used in advertising copy in Scandinavia; big coloured illustrations and terse copy in Spain; sex appeal is avoided in Pakistan... The appeal of a communication adaptation strategy is its relatively low cost of implementation." (p.675)

The evidence obtained from the analysis of variance indicated, moreover, that while there was no significant main effect of respondent gender within either the white (Table 8:2), or ethnic (Table 8:3), groups, in generating differences in ad response ratings, there was a significant

two-way interaction between ad layout and gender (Table 8:1),
~~~~~  
implying that women as a group respond differently to the  
same ad layout, depending on the promotional appeal. In  
addition there was observed a significant two way interaction  
within the Asian ethnic group, between respondent 'gender'  
and 'religion', implying that gender differences did interact  
with religious belief structures, to give significantly  
different ratings for 'all white', 'integrated', 'all ethnic'  
and 'product only' ad variations.

The significant interactions between ethnic origin and ad  
layout on the one hand, and, ethnic religious groupings and  
gender on the other, provide impressive support for the  
segmentation hypothesis with regard to ethnic groups, and  
also for the fact that, variations in pictorial treatments do  
result in ethnic and white differences in their attitudes to  
ad layouts at varying levels of integration.

In conclusion, the findings imply that ethnic and white  
attitudinal responses to ad appeals are essentially a  
function of ethnic origin, religion and gender differences.  
The relative saliency of these demographic characteristics,  
therefore, results in an obvious need for segmentation  
strategies in designing promotional ad appeals for ethnic  
segments, as well as for religious subsegments within the  
same ethnic group.

## SUMMARY AND CONCLUSIONS TO CHAPTER 8

In this chapter an attempt was made to assess the communications effectiveness of alternative ad appeals. The summary below, gives a resume of the findings.

### SUMMARY

1. The white group did not evaluate either the 'white', 'integrated', 'ethnic' or 'car-only' ad appeals as significantly different from each other. In terms of relative ad favorability as expressed by mean ratings, the order followed the positive affect evoked by the 'car-only' (4.93), 'ethnic' (4.73), 'white' (4.51), and, lastly, the 'integrated' (3.90) ads.
2. The Asian ethnic group evaluated the 'ethnic' ad appeal significantly more positively, in comparison to the 'all white' ad. In terms of relative ad favorability, the order followed the positive affect evinced for the 'ethnic' (5.91),  $p < .01$ , 'car-only' (5.68),  $p < .01$ , 'integrated' (5.51), and 'white' (5.41) ads.
3. The West Indian ethnic group did not evaluate either the 'car-only' or 'all white' ad appeals as significantly different, in terms of mean ratings. It was not tested for the 'integrated' or 'ethnic' ad layouts, which were relevant only in the context of the Asian ethnic group.

In terms of relative ad favorability, as expressed in mean ratings, the order followed the affect created by the 'car-only' (4.76); and 'all white' (4.39) ads.

An assessment of each of the ad layouts across all three groups indicated the following:-

#### THE 'WHITE' AD ~~~~~

The mean rating by the Asian ethnic group (5.51), was significantly more positive than that of 3.90 by the white group. On specific items, the 'white' ad was rated by the ethnic group as significantly higher, on items 2,4,5,6,9,10,11,14,16,17,18 and 19, in comparison to the white group, or, better, more outstanding, beautiful, friendly, interesting, appealing, impressive, clear, realistic, meaningful, sophisticated and dignified, than it was considered by the white group. However, there was no comparably significant difference between West Indian ethnic and white groups, except for its being regarded as friendlier, by the former group.

#### THE 'INTEGRATED' AD ~~~~~

The 'integrated' ad, in comparison to the 'white' ad, was not rated as significantly different in the case of either Asian ethnic, or white groups. It was, nevertheless, slightly more favorably rated than the 'white' ad by the Asian ethnic



group, and slightly less favorably rated by the white group.

In perspective, the 'integrated' ad could be considered to have differed from traditional 'all white' ad appeals in its greater emphasis on more information content. However, the possibility of an information overload in integrated ad strategies, could not be denied. Additionally, it was expected that there might be a tendency for consumers to block out ad information, thus leading to a 'boomerang' effect in the use of such strategies.

Consequently, it can be concluded that, the effectiveness of integrated advertising would ultimately be dependent on the capacity of target audiences to process information content.

#### THE 'ASIAN ETHNIC' AD ~~~~~

The mean rating by the Asian ethnic group was significantly higher, than the white group rating (5.91:4.73). With regard to specific ad-items, Asian ethnic ratings were significantly higher on items 4,7,8,9,10,14,16,17 and lower on 20, thus favouring it, like the 'white' ad, as more outstanding, interesting, appealing, clear, realistic, meaningful, thought less feminine than the white group, but in addition, also more relevant and likeable. Overall, however, the 'ethnic' ad elicited positive reactions by both groups.

It was concluded that, the 'ethnic' ad had much greater

believability content and, was regarded by the Asian ethnic group, as higher in its perceived credibility. Ethnic cultural appeals obviously have an emotional bias causing them to be significantly more effective in advertisements targeting these groups. Since advertisers are ultimately interested in the promotion of advertised products, the evidence tended to support the fact that, marketers can capitalise on a strategy of promoting ethnic ads through the general white media, rather than construct separate ad campaigns with higher promotional costs.

The simultaneously positive affect created by the 'ethnic' ad within the white group, provided ample support for the conclusion that, presently existing negative ethnic stereotypes have only been the result of the derogatory portrayal of these groups via the media. Any such future strategies would require, however, that in order to erase undesirable ethnic stereotypes, ethnic ads be positively depicted, with greater frequencies of appearance, and much more than the minor adjustments that are attempted through 'integrated' ad settings, which allow for the manipulation of ethnic composition and, consequently allow the whole to detract from the parts.

#### THE 'PRODUCT-ONLY' AD ~~~~~

The rating by the Asian ethnic group (5.68), was significantly higher than that of 4.93 given by the white

group ( $p < .05$ ). There were also no significant differences in mean ratings, for the West Indian ethnic (4.76) and white (4.93) groups ( $p = NS$ ). With regard to specific ad items, the Asian ethnic group rated as significantly higher, items 4,12,13,17,18,19, thus regarding it as more outstanding, informative, clear, meaningful, sophisticated and dignified, in comparison to the white group.

Similarly, West Indian ethnic group ratings were significantly higher on items 3,6,7,13 and 14 but lower on items 1,15 and 20, thus making it more orderly, friendly, relevant, informative, clear, but also less pleasant or eye catching or feminine.

The higher ratings assigned to the 'car-only' ad by the Asian and West Indian ethnic, as well as the white groups, implied that 'product only' ads evoke more favorable responses than ads using female models (except for the significantly emotional cultural affect elicited by 'ethnic' ads).

Given these results, it can be concluded that in the absence of human models, 'product-only' ads would tend to draw on cognitive dimensions related to product specific attributes. The focus on 'product' images alone, would consequently lead to higher ratings based on 'cognitive' rather than 'affective' appeals. The greater positive affect for the 'car-only' ad, also gave obvious indications of an interaction between 'product type' and 'model', such that a

mismatch would follow from the use of female models with product categories such as automobiles, with as yet, predominantly masculine connotations, and would, inevitably, lead to a lowering of ad effectiveness. Granting this situation, any ensuing attitudinal incongruity could only be considered to give rise to human information processing, confused and dysfunctional across ethnic as well as white consumer groups.

Since product-only ads give a neutral status to cultural differences by appealing to similarities in ethnic and white groups, it is evident that they can act as organising concepts with capacities to cover broader ranges of 'product image' and 'self image' dimensions, than ads using human models in their appeals.

In the ultimate analysis, it has to be accepted that, if cognitive rather than affective dimensions are more effective, then advertising would need to be sensitive to the role of cognitive responses as mediating elements in the appeals evoked by ad stimuli, and, accordingly design more relevant advertising strategies considering these variables.

It can therefore be suggested that on the one hand, ad strategies using affective dimensions could be improved by using significantly ethnic, 'cultural' appeals. On the other hand, sophisticated ad designs conveying product attributes would require less of the emotional, and, more cognitive

dimensions to be portrayed.

As formal strategies in advertising, it must be remembered that, ethnic cultural appeals have qualities of elasticity and adaptability for ethnic groups and will, therefore, not be easily dismantled by advertisers. However, the differences evinced in ad layouts due to cultural orientations, have yet to be incorporated into quantitatively sophisticated media portrayals.

Chapter 9 next reviews the ethnic groups on their retail  
~~~~~  
patronage patterns, ostensibly with the aim of determining appropriate distribution and promotion strategies.

CHAPTER 9 ~~~~~

ETHNIC RETAIL PATRONAGE ~~~~~

INTRODUCTION ~~~~~

As yet another aspect contributing to the segmentation of ethnic groups, the chapter here investigates and compares the Asian and West Indian ethnic groups, with white shoppers in each instance, on variables relating to retail grocery shopping, particularly with regard to the type of store patronised, extent of store loyalty, grocery shopping frequency, time consumed and mode of transport used most frequently in transit to the regular retail outlet.

Additional to testing for the segmentation thesis, the investigation was necessitated on two factors. First, a substantial body of data has accumulated over the past decade, on differences in shopping and retail patronage patterns of black and white American consumers (Bullock, 1961; Cunningham, 1971), but there is virtually no concrete comparable data on black and other ethnic shoppers in the UK (Piper, 1977). This is complicated, furthermore, by the growing concern that blacks constitute a sizeable low-income disadvantaged minority charged high prices in many instances (Caplovitz, 1967; Andreasen, 1979). Second, the literature on ethnic groups indicates that the retail shopping patterns of Japanese and Chinese Asian-American ethnic groups, have

taken very different forms compared to those of black shoppers, mainly because of the linguistic and cultural 'inter-ethnic' differences between the groups. These differences make it crucial for marketers to understand black and other ethnic purchase patterns, in order to capitalise profitably on programs of black capitalism on the one hand, and to reconstruct depressed neighbourhoods in ethnic market areas on the other (Cox, 1969; Berry, 1972).

Urban development schemes such as those launched through community development programs in Britain, have similarly expressed concern over the fate of inner city retailing. The need to understand Asian and West Indian ethnic retail patterns becomes all the more imminent for such programs to be effectively and expediently launched, considering that ethnic groups comprise sizeable sections of the inner city consumer markets.

PART 1

SECTION 9:1

EMPIRICAL EVIDENCE ON ETHNIC RETAIL PATRONAGE

Asian and West Indian ethnic shoppers were, in each instance, compared with the white shopper group, for retail patronage decisions relating to the following variables:-

1. Type of store patronised
2. Purchasing levels by shopper age distribution and socioeconomic structure
3. Shopper store loyalty
4. Frequency of grocery shopping
5. Mode of transport and time in transit to retail outlet
6. Store image perceptions for 'real' and 'ideal' stores

Table 9:1 highlights the significant differences on the above
 ~~~~~  
 variables as they relate to the Asian ethnic and white  
 groups. Table 9:2 highlights comparable data with regard to  
 ~~~~~  
 the West Indian ethnic and white groups.

ETHNIC MARKET CONTROL IN THE GROCERY PRODUCT FIELD ~~~~~

The Asian and West Indian ethnic and white groups were compared, on the regular purchasing agents for grocery shopping. The results indicated that in the Asian ethnic group, female shoppers comprised only 27 per cent regular grocery purchasing agents. This was significantly lower than estimated for the white group, where female shoppers predominated (98 per cent), with $X^2=123.1$ and $p < .001$. The proportion of female shoppers was similarly high in the West Indian ethnic group (95 per cent), and, therefore, not different ($X^2=1.96$, $p=NS$), from the white group.

TABLE 9:1

| RETAIL PATRONAGE IN THE ASIAN ETHNIC GROUP | | | | | | | |
|--|--------|-------|---------|-------|----------------|---------------|-----------|
| | WHITE | | ASIAN | | X ² | SIG.
LEVEL | DIRECTION |
| | (N=86) | | (N=200) | | | | |
| | N | % | N | % | | | |
| <u>MARKET CONTROL</u> | | | | | | | |
| MALE SHOPPERS | 2 | 2 | 146 | 73 | 123.1 | .001 | ASIAN |
| FEMALE SHOPPERS | 84 | 98 | 54 | 27 | 123.1 | .001 | WHITE |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>SHOPPER AGE GROUP</u> | | | | | | | |
| 15-24 yrs | 5 | 6 | 11 | 6 | .03 | NS | - |
| 25-34 yrs | 9 | 10 | 60 | 30 | 13.62 | .001 | ASIAN |
| 35-44 yrs | 27 | 31 | 96 | 48 | 7.45 | .01 | ASIAN |
| 45-54 yrs | 17 | 20 | 10 | 5 | 13.66 | .001 | WHITE |
| 55-64 yrs | 15 | 17 | 3 | 1 | 1.89 | NS | - |
| 65+ yrs | 13 | 15 | 3 | 1 | 18.60 | .001 | WHITE |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>SOCIAL CLASS</u> | | | | | | | |
| AB | 4 | 5 | 6 | 3 | .12 | NS | - |
| C1/C2 | 29 | 33 | 20 | 10 | 22.20 | .001 | WHITE |
| DE | 48 | 56 | 164 | 82 | 26.46 | .001 | ASIAN |
| F | 5 | 6 | 10 | 5 | .01 | NS | - |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>SHOPPER INCOME</u> | | | | | | | |
| £2000-£2999 | - | - | 2 | 1 | - | NS | - |
| £3000-£3999 | 3 | 4 | 6 | 3 | .29 | NS | - |
| £4000-£4999 | 17 | 20 | 118 | 59 | 38.70 | .001 | ASIAN |
| £5000-£7999 | 51 | 59 | 36 | 18 | 46.53 | .001 | WHITE |
| £8000+ | 15 | 17 | 38 | 19 | .22 | NS | - |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>MODE OF TRANSPORT</u> | | | | | | | |
| CAR | 7 | 8 | 97 | 48 | 44.10 | .001 | ASIAN |
| BUS/PUBLIC | | | | | | | |
| TRANSPORT | 3 | 4 | 4 | 2 | .11 | NS | - |
| WALK | 76 | 88 | 99 | 50 | 20.23 | .001 | WHITE |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>TIME IN TRANSIT</u> | | | | | | | |
| 0-5 mins | 51 | 59 | 88 | 44 | 5.04 | .05 | WHITE |
| 5-10 mins | 28 | 33 | 104 | 52 | 9.94 | .01 | ASIAN |
| 10-30 mins | 7 | 8 | 8 | 4 | .215 | NS | - |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>SHOPPING FREQUENCY</u> | | | | | | | |
| 2-3 times/wk | 6 | 7 | 6 | 3 | 1.48 | NS | - |
| WEEKLY | 78 | 91 | 132 | 66 | 17.5 | .001 | WHITE |
| FORTNIGHTLY/ | | | | | | | |
| MONTHLY | 2 | 2 | 62 | 31 | 30.14 | .001 | ASIAN |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>STORE TYPE</u> | | | | | | | |
| ETHNIC INDEPENDENT | 2 | 2 | 116 | 58 | 79.23 | .001 | ASIAN |
| SUPERMARKET | 15 | 17 | 54 | 27 | 3.54 | .10 | ASIAN |
| DISCOUNT CHAIN | 69 | 81 | 30 | 15 | 110.2 | .001 | WHITE |
| | N=86 | [100] | N=200 | [100] | | | |
| <u>STORE LOYALTY</u> | | | | | | | |
| 90% PURCHASE IN | | | | | | | |
| ONE STORE | 80 | 93 | 70 | 35 | 78.87 | .001 | WHITE |
| 75% PURCHASES IN | | | | | | | |
| ONE STORE | 4 | 5 | 110 | 55 | 65.71 | .001 | ASIAN |
| 50% PURCHASES IN | | | | | | | |
| ONE STORE | 2 | 2 | 20 | 10 | 3.37 | .10 | ASIAN |
| | N=86 | [100] | N=200 | [100] | | | |

TABLE 9:2

RETAIL PATRONAGE IN THE WEST INDIAN ETHNIC GROUP

| | WHITE
(N=86) | | WEST INDIAN
(N=22) | | X ² | SIG. | DIRECTION |
|--------------------|-----------------|-------|-----------------------|-------|----------------|------|-------------|
| MARKET CONTROL | N | % | N | % | | | |
| MALE SHOPPERS | 2 | 2 | 1 | 5 | 1.96 | NS | - |
| FEMALE SHOPPERS | 84 | 98 | 21 | 95 | 1.96 | NS | |
| | N=86 | [100] | N=22 | [100] | | | |
| AGE STRUCTURE | | | | | | | |
| 15-24 yrs | 5 | 6 | 2 | 9 | 1.08 | NS | - |
| 25-34 yrs | 19 | 10 | 3 | 14 | .34 | NS | - |
| 35-44 yrs | 27 | 31 | 7 | 32 | .09 | NS | - |
| 45-54 yrs | 17 | 20 | 8 | 36 | 3.72 | .10 | WEST INDIAN |
| 55-64 yrs | 5 | 17 | 2 | 9 | .94 | NS | - |
| 65+ yrs | 13 | 15 | - | - | - | - | - |
| | N=86 | [100] | N=22 | [100] | | | |
| SOCIAL CLASS | | | | | | | |
| A/B | 4 | 5 | 1 | 5 | .29 | NS | - |
| C1/C2 | 29 | 33 | 4 | 18 | 1.04 | NS | - |
| D/E | 48 | 56 | 14 | 63 | .83 | NS | - |
| F | 5 | 6 | 3 | 14 | 2.91 | NS | - |
| | N=86 | [100] | N=22 | [100] | | | |
| SHOPPER INCOME | | | | | | | |
| £2000-£2999 | - | - | 2 | 9 | - | - | - |
| £3000-£3999 | 3 | 4 | 10 | 45 | 42.57 | .001 | WEST INDIAN |
| £4000-£4999 | 17 | 20 | 3 | 14 | .12 | NS | - |
| £5000-£7999 | 51 | 59 | 4 | 18 | 10.2 | .01 | WHITE |
| £8000+ | 15 | 17 | 3 | 14 | .93 | NS | - |
| | N=86 | [100] | N=22 | [100] | | | |
| MODE OF TRANSPORT | | | | | | | |
| CAR | 7 | 8 | 2 | 9 | .032 | NS | |
| BUS/PUBLIC | | | | | | | |
| TRANSPORT | 3 | 4 | 1 | 5 | .75 | NS | - |
| WALK | 76 | 88 | 19 | 86 | .012 | NS | - |
| | N=86 | [100] | N=22 | [100] | | | |
| TIME IN TRANSIT | | | | | | | |
| 0-5 mins | 51 | 59 | 11 | 50 | .30 | NS | - |
| 5-10 mins | 28 | 33 | 9 | 41 | .976 | NS | - |
| 10-30 mins | 7 | 8 | 2 | 9 | .032 | NS | - |
| | N=86 | [100] | N=22 | [100] | | | |
| SHOPPING FREQUENCY | | | | | | | |
| 2-3 times/wk | 6 | 7 | 1 | 5 | .0051 | NS | - |
| WEEKLY | 78 | 91 | 19 | 86 | .042 | NS | - |
| FORTNIGHTLY/MOHLY | 2 | 2 | 2 | 9 | 4.54 | .05 | WEST INDIAN |
| | N=86 | [100] | N=22 | [100] | | | |
| STORE TYPE | | | | | | | |
| ETHNIC INDEPENDENT | 2 | 2 | 3 | 14 | 7.96 | .01 | WEST INDIAN |
| SUPERMARKET | 15 | 17 | 6 | 27 | 1.79 | NS | - |
| DISCOUNT CHAIN | 69 | 81 | 13 | 59 | 3.20 | .10 | WHITE |
| | N=86 | [100] | N=22 | [100] | | | |
| STORE LOYALTY | | | | | | | |
| 90% PURCHASES IN | | | | | | | |
| ONE STORE | 80 | 93 | 14 | 64 | 8.32 | .01 | WHITE |
| 75% PURCHASES IN | | | | | | | |
| ONE STORE | 4 | 5 | 6 | 27 | 13.53 | .001 | WEST INDIAN |
| 50% PURCHASES IN | | | | | | | |
| ONE STORE | 2 | 2 | 2 | 9 | 4.54 | .05 | WEST INDIAN |
| | N=86 | [100] | N=22 | [100] | | | |

* DISTRIBUTIONS SHOWN FOR WEST INDIAN GROUP BASED ON A SAMPLE SIZE OF 22. FIGURES THEREFORE INVOLVE LARGE SAMPLING ERROR

ETHNIC AND WHITE SHOPPER PURCHASING LEVELS BY
~~~~~  
DEMOGRAPHIC STRUCTURE  
~~~~~

Shopper groups differed, in their purchasing levels with regard to the proportions of consumers in each age-group, socioeconomic and income category. Thus, 30 per cent Asian ethnic shoppers were in the 25-34 yrs category, compared to 10 percent white shoppers ($X^2=13.62$, $p < .001$). Again, 48 per cent Asian ethnic shoppers were in the 35-44 yrs category in comparison to 31 per cent of the white group ($X^2 = 7.45$, $p < .01$). A significantly higher proportion in the Asian ethnic group (82 per cent), were also in the D/E socioeconomic category in comparison to 56 per cent white shoppers ($X^2 = 26.46$, $p < .001$). The West Indian ethnic group was similarly within the lower age groups (23 per cent in the 15-34 yrs category), and thus differed though not significantly, from white shoppers.

The Asian and West Indian ethnic groups were, moreover, in the lower income ranges. Thus, 59 per cent Asian ethnic shoppers were in the £4000-£4999 per annum, income category, in comparison to 20 per cent white shoppers ($X^2=38.7$, $p < .001$). At a comparable level, a significantly higher proportion in the West Indian ethnic group (45 per cent) were in the £3000-£3999 per annum income category ($X^2 = 42.57$, $p < .001$), with 4 per cent of the white group in this range. In both cases, white shoppers predominated (59 per cent), in the £5000-£7999 income category, in comparison to 18 per cent each, of the Asian and West Indian ethnic groups.

MODE OF TRANSPORT & TRANSIT TIME FOR GROCERY SHOPPING
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The Asian ethnic group included 48 per cent shoppers who made frequent use of the car, as a mode of transport, compared to 8 per cent in the white shopper group ( $X^2 = 44.1$ ,  $p < .001$ ). At a comparable level, the proportion in the West Indian ethnic group (9 per cent), regularly using the automobile for grocery shopping, did not differ significantly from the proportion (8 per cent), in the white shopper group.

Comparisons on the time spent, in transit to the retail store frequented most often, indicated that Asian ethnic shoppers did differ significantly on time in transit to the regularly frequented grocery outlet. 44 per cent claimed to spend less than 5 minutes for transit, compared to 59 per cent in the white shopper group ( $X^2 = 5.04$ ,  $p < .05$ ). However, 52 per cent Asian ethnic shoppers also spent greater proportions of time i.e., 5-10 minutes, compared to 33 per cent white shoppers in this category ( $X^2 = 9.94$ ,  $p < .01$ ).

In contrast, the West Indian ethnic group contained 50 per cent shoppers who claimed to spend less than 5 minutes, in comparison to 59 per cent of the white group ( $p = NS$ ). Again, 41 per cent in this latter group spent 5-10 minutes, compared to 33 per cent for the white group in this category and were thus, not significantly different from white shoppers.

## GROCERY SHOPPING FREQUENCIES

Analyses of frequencies of grocery shopping per month, indicated that a significant proportion in the Asian ethnic group (31 per cent), shopped at 'fortnightly' or longer intervals, compared to 2 per cent white shoppers ( $X^2 = 30.14$ ,  $p \leq .001$ ). The proportion in the West Indian group (9 per cent), who shopped at 'fortnightly' or longer intervals, also differed significantly from white shoppers (2 per cent), in this category ( $X^2 = 4.54$ ,  $p \leq .05$ ), though the contrast was not as significant as in the case of the Asian ethnic group. A higher proportion in the white group (91 per cent), were also found to shop at 'weekly' intervals, in comparison to 66 per cent for the Asian ethnic group ( $X^2 = 17.5$ ,  $p \leq .001$ ), though the difference was not significant when compared to the proportion in the West Indian ethnic (86 per cent), group. These estimates additionally, pointed to the fact that, despite differences, the proportions of 'weekly' shoppers were high in all three groups.

## TYPE OF RETAIL STORE PATRONISED

The shopper groups were analysed on the proportions in each group regularly patronising the small independents, supermarkets, or multiple chain stores. The evidence indicated that a significantly greater proportion in the Asian ethnic group (58 per cent), regularly patronised the small independent grocery outlets, in comparison to 2 per

cent for the white group ( $X^2 = 79.23$ ,  $p \leq .001$ ). A greater proportion (27 per cent), also patronised supermarket outlets, in contrast to 17 per cent white shoppers ( $X^2 = 3.54$ ,  $p \leq .10$ ).

With regard to the West Indian ethnic group, a significant proportion (14 per cent), again patronised the small ethnic independents, in comparison to only 2 per cent white shoppers who claimed to do so ( $X^2 = 7.96$ ,  $p \leq .10$ ). A higher proportion of white shoppers patronised the multiple food chains (81 per cent), in comparison to 15 per cent Asian ( $X^2 = 110.2$ ,  $p \leq .001$ ), and 59 per cent West Indian ( $X^2 = 3.2$ ,  $p \leq .10$ ), ethnic shoppers.

#### ETHNIC STORE LOYALTIES

Single store loyalty was measured as the proportion of shoppers in each group who purchased:-

- 1). 90% or more groceries at one, regular retail outlet, allowing 10% for fill-in items from other stores.
- 2). 75% groceries at only one retail outlet, allowing 25% at a second or more stores.
- 3). 50% groceries at only one retail outlet, with the remaining 50% at a second or more outlets.

The measurements were thus an approximation to estimations from panel data, of single store loyalty, as the proportion

of purchases in the store used most often (Tate, 1974).  
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The findings indicated that Asian ethnic shoppers had significantly lower levels of store loyalty. Thus, 55 per cent made 75% purchases in one store ($X^2=65.71$, $p < .001$). A further 10 per cent made only 50 per cent purchases in one store, with the remaining 50 per cent at a second or more stores ($X^2=3.37$, $p < .10$). In contrast, 93 per cent white shoppers claimed to make 90% purchases in one store.

Similar findings occurred for the West Indian ethnic group, where 27 per cent shoppers made 75% of their grocery purchases in one store ($X^2=13.53$, $p < .001$), and another 9 per cent made only 50 per cent of their purchases in a single store ($X^2=4.54$, $p < .05$), in contrast to the significantly higher proportion (93 per cent), of 'one-roof' white shoppers.

ETHNIC AND WHITE 'REAL' STORE IMAGE PERCEPTIONS ~~~~~

The three shopper groups were compared on 'real' store profiles, according to ratings on the seven store image dimensions, which together constituted store image (Appendices I and J). Since it was assumed that shoppers
~~~~~  
patronised the most favorable retail outlet as the regular store at any given point in time, the differences in shopper ratings were taken to imply differences in shopper concepts, with regard to the image of the regular store.

## 'REAL' STORE PERCEPTIONS FOR THE ASIAN ETHNIC GROUP

### IMAGE DIMENSION I: PHYSICAL CHARACTERISTICS OF THE STORE

The Asian ethnic group differed, in a significantly lower overall mean rating on 'Physical characteristics of the Store' (51.15), compared to the white rating of 63.62 ( $p < .001$ ), as shown in Appendix I:2. Specifically, the Asian ethnic group gave significantly lower ratings (Appendix I:3), for item 4 ('ease of finding items'), with the order Asian:White=4.02:5.25,  $p < .05$ , item 6 ('merchandise spacing'), with a mean rating of 4.66 compared to the white group rating of 5.50 ( $p < .05$ ) and item 7 ('product layout'), with mean ratings, 5.00:5.62 ( $p < .10$ ). Also rated less favorably, but not significantly differently, by the Asian ethnic group, were items 1,2,3,5,8,9,11, i.e., 'store cleanliness', 'decor', 'lighting', 'display', 'neatness', 'ease of moving' and 'speed of checkout'.

### IMAGE DIMENSION II: STORE LOCATION

The Asian ethnic group was found to differ significantly, on an overall lower mean rating for 'Store Location' (25.23), compared to the white rating of 29.12, with  $p < .001$  (Appendix I:2). With regard to specific items, differences were statistically significant (Appendix I:3), for item 14 ('ease of driving'), with an Asian ethnic store rating of 5.02 compared to the white rating of 5.75 ( $p < .10$ ). Mean



ratings were also lower, though not significant, for items 13,15,16, i.e. 'time required to reach store', 'ease of parking', and 'convenience to other stores'. The mean rating for item 12 ('nearness of location'), indicated a slightly more favorable attitude by the Asian ethnic group, compared to a rating of 5.68 by the white shopper group.

#### IMAGE DIMENSION III: STORE PRICING ~~~~~

The average rating for the 'Store Pricing' dimension by the Asian ethnic group (13.61), did not differ significantly compared to the rating by the white group (14.68), (Appendix I:2). However, with regard to specific items comprising this dimension, (Appendix I:3), the Asian ethnic group gave a significantly higher mean rating on item 19 ('special prices on items'), at 4.76 ( $p \leq .05$ ), compared to the white rating of 3.62. Item ratings were, nevertheless, to the positive end of the scale for both groups.

#### IMAGE DIMENSION IV: PRODUCT DEPENDABILITY ~~~~~

For the store image dimension dealing with grocery 'product quality', the Asian ethnic group gave a significantly less favorable overall rating of 18.94, compared to the white rating of 23.75, at  $p \leq .001$  (Appendix I:2). On specific items (Appendix I:3), the mean rating by the Asian ethnic group (5.10), was significantly lower ( $p \leq .05$ ) on item 20 ('dependability of products'), compared to the white rating

of 5.87, and also item 23 ('product value'), at 5.23, compared to the white rating of 6.00,  $p < .05$ . All items again elicited positive ratings, from both groups.

#### IMAGE DIMENSION V: RANGE OF MERCHANDISE SELECTION ~~~~~

The overall rating assigned by the Asian ethnic group, on 'Range of Merchandise' was significantly less favorable (15.69), than the rating by the white group, of 17.87 ( $p < .01$ ), (Appendix I:2). With regard to specific items (Appendix I:3), significantly lower ratings were obtained for item 24 ('variety in product selection'), with an Asian ethnic rating of 5.43, compared to the white rating of 6.25 ( $p < .05$ ), and item 26, ('stock turnover'), at 5.43:6.25,  $p < .05$ . Item 25 ('number of brands'), was also assigned a lower rating by the Asian ethnic (5.02), compared to the white group (5.56), though the difference in this latter case was not statistically significant.

#### IMAGE DIMENSION VI: STORE PERSONNEL ~~~~~

The dimension dealing with 'Store Personnel' elicited an overall mean rating by the Asian ethnic group (20.0), which was significantly lower than the white rating of 23.12, with  $p < .01$  (Appendix I:2). On specific items (Appendix I:3), the Asian ethnic rating was significantly lower, at 5.02, for item 27 ('courtesy of personnel'), compared to the white rating of 6.18 ( $p < .01$ ). Mean ratings by the Asian ethnic

group were also lower for items 28 ('friendliness of personnel') and item 29 ('helpfulness of personnel'); though differences for these latter items could not be considered significant.

IMAGE DIMENSION VII: STORE PATRONAGE BY FRIENDS  
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The overall rating by the Asian ethnic group on this dimension, was 17.46. This was significantly lower than the white rating of 23.43, at $p \leq .001$ (Appendix I:2).
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'REAL' STORE PERCEPTIONS FOR THE WEST INDIAN ETHNIC GROUP  
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IMAGE DIMENSION I: PHYSICAL CHARACTERISTICS OF STORE
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The overall rating for the dimension dealing with 'Physical Characteristics of the Store' by the West Indian ethnic group was 64.50, compared to the white rating of 63.20. The difference in ratings for the two groups was not statistically significant (Appendix I:2). On specific items however (Appendix I:4), mean ratings were higher for item 6 ('product spacing'), with a rating of 6.30 for the West Indian ethnic group, compared to a white rating of 5.50 ( $p \leq .10$ ), and item 7 ('product layout'), with a West Indian rating of 6.50 ( $p \leq .05$ ), compared to a white rating of 5.62. The West Indian ethnic rating was, however, significantly less favorable on item 10 ('pleasant atmosphere'), at a mean value of 6.00, compared to the white rating of 6.56 ( $p \leq .10$ ).

## IMAGE DIMENSION II: CONVENIENCE OF STORE LOCATION ~~~~~

The West Indian ethnic rating for the overall dimension on 'Store Location' was 28.00. However, this was not significantly different from the white rating of 29.12 (Appendix I:2). With regard to specific items (Appendix I:4), the West Indian ethnic rating was significantly less favorable for item 15 ('ease of parking'), which elicited a mean rating of 3.30, compared to the white rating of 5.12 ( $p \leq .05$ ).

## IMAGE DIMENSION III: PRODUCT PRICING ~~~~~

The West Indian ethnic rating over all three items comprising the 'Product Pricing' dimension was 15.10. This was slightly, though not significantly higher, than the overall white rating of 14.69 (Appendix I:2). There were, moreover, no significant differences observed in mean ratings for individual items (Appendix I:4), on this dimension.

## IMAGE DIMENSION IV: PRODUCT DEPENDABILITY ~~~~~

The West Indian ethnic rating on the overall dimension (comprising 4 items), was 24.0. This was slightly, though not significantly higher, than the white rating of 23.75 (Appendix I:2). No significant differences were observed, in ratings on individual items (Appendix I:4), contributing to this dimension, namely 'dependability of products', 'value

for money', 'well known brands' and 'good/bad product buys'.

IMAGE DIMENSION V: RANGE OF MERCHANDISE SELECTION  
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The West Indian ethnic rating over the three items comprising 'Range of Merchandise Selection', was 17.00. This was slightly, though not significantly lower, than the white rating of 17.87 (Appendix I:2). There were moreover no significant differences observed in mean ratings for individual items (Appendix I:4), on this dimension.

IMAGE DIMENSION VI: STORE PERSONNEL
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The West Indian ethnic rating over the items comprising this dimension, was 23.70. This was slightly higher than the white rating of 23.12, but the difference was again not statistically significant, as observed also (Appendix I:2), for Image Dimension IV ('Product Dependability'), and Image Dimension V ('Merchandise Selection').

IMAGE DIMENSION VII: STORE PATRONAGE BY FRIENDS  
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The West Indian ethnic rating on this dimension was 16.10. This was significantly lower than the white group rating of 23.44 at $p < .001$ (Appendix I:2). More specifically, ratings by the West Indian ethnic group were significantly lower (Appendix I:6), for all 4 items comprising the dimension, i.e., item 31 ('known to friends'), $p < .001$, item 32 ('liked

by friends'), $p \leq .001$, item 33 ('recommended by friends'), $p \leq .001$, and item 34 ('patronised by friends'), with $p \leq .01$ in this latter case.

COMPARISON OF 'REAL' AND 'IDEAL' STORE IMAGES

'REAL' & 'IDEAL' STORE IMAGE DIFFERENCES FOR THE WHITE GROUP

Ratings by the white group for 'real' and 'ideal' store concepts were analysed, across all seven store image dimensions (Appendix I:5). It was found that the 'ideal' store rating was significantly higher on Dimension III ('Product Pricing'), at 17.5, compared to the 'real' store rating of 14.68, with $p \leq .05$. Ratings for dimensions I, II, IV, VI and VII (all except dimension V), were also higher for the 'ideal' store image, though differences were in each case, not found to be statistically significant.

Each dimension was further analysed, with regard to specific items (Appendix I:6), in order to test for differences in 'real' and 'ideal' store image perceptions. For dimension I, ('Physical Characteristics of Store'), the 'real' store was rated significantly lower than the 'ideal' store on items 1, 5, 6, 7, 9 and 11, i.e., 'store cleanliness', $p \leq .01$, 'product display', $p \leq .05$, 'product spacing', $p \leq .01$, 'product layout', $p \leq .01$, 'ease of moving', $p \leq .10$ and 'checkout speed', again $p \leq .10$.

On dimension II ('Convenience of Store Location'), the 'real' store was rated significantly lower on items 12,13,15, i.e., 'nearness of location', $p \leq .05$, 'time required to reach store', $p \leq .05$, and 'ease of parking', at $p \leq .01$.

On dimension III ('Product Pricing'), the 'real' store was not rated as significantly different from the 'ideal' store for any of the individual items comprising the dimension.

On dimension IV ('Product Quality'), the 'real' store image was given a significantly lower rating for item 23, 'good/bad' product buys', with $p \leq .05$, in comparison to the 'ideal' store.

Dimensions V, VI and VII gave item ratings not significantly different, with regard to 'real' and 'ideal' store images.

'REAL' & 'IDEAL' STORE IMAGE DIFFERENCES FOR THE ASIAN ETHNIC
GROUP
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A comparison of Asian ethnic 'real' and 'ideal' store item ratings (Appendix I:5), indicated that the 'real' store was given a lower, though not significant, mean rating on dimension I ('Physical Attributes of Store'), with  $p=NS$ , compared to the 'ideal' store. For dimensions II,III,IV,V,VI, and VII, again, overall ratings for the 'real' store were consistently lower than for the 'ideal'

store, though differences were in each case not statistically significant.

An analysis of 'real' and 'ideal' store ratings for each dimension (Appendix I:7), indicated that mean ratings for the 'real' store were significantly lower than for the 'ideal' store, on items 1 ('store cleanliness'), with 'real': 'ideal' = 5.41:6.42,  $p \leq .01$ , on dimension I and, for items 12 and 13 on dimension II. More particularly these latter two were 'nearness to location' (5.71:6.50, with  $p \leq .01$ ), and 'time required to reach store' (5.82:6.50, with  $p \leq .01$ ).

On dimension III, ('Store Pricing'), item 17, 'prices charged', elicited a significantly lower rating for the 'real' store compared to that for the 'ideal' store (5.17:6.64, with  $p \leq .001$ ). Dimension IV ('Product Quality'), was not rated as significantly different for the 'real' or 'ideal' store images, on any of the four items for this dimension.

For dimension V, ('Merchandise Selection'), item 24 'variety in product selection' was given a significantly higher rating for the 'real', as compared to the 'ideal' store (5.43:2.64,  $p \leq .10$ ).

Dimension VI, ('Store Personnel'), indicated significantly lower ratings for the 'real' store, on item 27 ('courtesy of



personnel'), with mean ratings of the order, 5.51:6.28 for the 'real': 'ideal' stores respectively, at  $p < .05$ , and item 28 ('friendliness of personnel'), with mean ratings of 5.18:6.07, ('real': 'ideal' stores), at a 10 per cent level of significance.

For dimension VII, ('Patronage by Friends'), item 34, 'patronisation by friends', elicited a lower mean rating for the 'real' in comparison to the 'ideal' store (4.79:5.78, with  $p < .05$ ).

#### SATISFACTION WITH RETAIL OUTLET

The Asian and West Indian ethnic and white shoppers were further rated for their satisfaction with the retail outlet used most regularly. The evidence indicated that differences in mean ratings were not significant for Asian ethnic (6.00), in comparison to white shoppers (5.45), (Appendix I:3).  
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Similarly, the rating by the West Indian ethnic group (6.17), was also not found significantly different (Appendix I:4), in
~~~~~  
comparison to the white group.

PART 2  
~~~~~

INFERENCES FROM ETHNIC RETAIL PATRONAGE
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SECTION 9:2  
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ETHNIC GROCERY MARKET CONTROL
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On the basis of the empirical evidence, as stated in Section 9:1, it had been found that Asian ethnic female shoppers constituted a significantly lower proportion (27 per cent), of regular grocery shoppers compared to 98 per cent in the white group. The proportion of female grocery shoppers in the West Indian ethnic group (95 per cent), had not, however, differed significantly from the white shopper group (98 per cent).

From these results it could be inferred that, there did appear to be significant cultural differences affecting food/grocery purchase patterns by gender differentiation, for Asian ethnic and white consumer groups.

These findings were, ofcourse, consistent with the fact that significantly low economic activity rates have been recorded for Muslim women within the Asian ethnic segments (Smith, 1978; Barber, 1981), thus curtailing their buying power, in comparison to female shoppers in the West Indian ethnic and white groups.

ETHNIC SHOPPER PURCHASING LEVELS BY DEMOGRAPHIC STRUCTURE  
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PURCHASING LEVELS BY AGE DISTRIBUTION
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The findings had indicated that a proportion of 14 per cent shoppers in the West Indian ethnic group, were in the 25-34 yrs age group, compared to 10 per cent white shoppers in this group ( $p=NS$ ). Similarly, a significant proportion of the shoppers in the Asian ethnic group (30 per cent), were within the lower age groups. This evidence was thus consistent with findings on lower age distributions of ethnic groups, reported in previous surveys (Smith, 1978; Barber, 1981).  
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It could therefore be inferred that purchasing levels in the Asian and West Indian ethnic groups, were consistently in the lower age groups, in comparison to white shoppers.

PURCHASING LEVELS BY SOCIOECONOMIC STRUCTURE
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Higher proportions of shoppers in the Asian and West Indian ethnic groups had been found to prevail in the D/E socioeconomic category, compared to the proportion of white shoppers in this group. There was, moreover, a significantly lower proportion of West Indian shoppers in the A/B socioeconomic category. While the proportion was also lower in the case of the Asian ethnic group, it was not

significant. The findings thus gave consistent evidence that, marketers are targeting a primarily low socioeconomic and income segment, within the Asian and West Indian ethnic shopper groups.

#### SECTION 9:4 ~~~~~

#### ETHNIC GROCERY SHOPPING FREQUENCIES ~~~~~

The findings indicated that significant proportions (31 per cent and 9 per cent), of shoppers in the Asian and West Indian ethnic groups respectively, purchased groceries at 'fortnightly' or longer intervals, in comparison to only 2 per cent white shoppers. The evidence for the white shopper group, was consistent with research by Mackay, 1973, who indicated that white shoppers follow a 'weekly' purchasing cycle for grocery purchasing. In contrast, the significantly longer purchasing cycles observed for the Asian ethnic group, implied, in addition, a greater proportion of purchases and, consequently larger expenditure outlays per trip.

#### SECTION 9:5 ~~~~~

#### MODE OF TRANSPORT AND TRANSIT TIME IN ETHNIC GROCERY ~~~~~ SHOPPING ~~~~~

The evidence had reported significantly greater usage of car transport for grocery shopping purposes, within the Asian

ethnic segment (though not for the West Indian ethnic group), in comparison to white shoppers. This appears to have been consistent, and in line with the fact that, a higher proportion of the Asian ethnic group was constitutive of male shoppers, with easier access to car usage. The findings implied moreover, that retailers are targeting a largely car-owning group of male shoppers within the Asian ethnic segment, with greater mobility and, hence, the tendency to use market centres at longer distances.

The evidence indicated, furthermore, that a greater proportion of the Asian ethnic group spent more time in transit, compared to white shoppers. Differences for the West Indian ethnic in comparison to the white group, followed a similar direction, though not significant to any degree. Overall, these findings tended to substantiate previous research on black shopping patterns (Caplovitz, 1967; Feldman and Star, 1968; Goodman, 1968), which indicates that black shoppers do go outside the immediate market area for more competitive food shopping, and would, consequently, spend more time in transit.

#### SECTION 9:6

#### TYPE OF RETAIL OUTLET PATRONISED

A significantly greater proportion of shoppers in the Asian ethnic group (58 per cent), had been found to patronise small

'ethnic' independents, compared to the white shopper group (2 per cent). A similar difference in West Indian ethnic (14 per cent), and white shopper groups was also significant. It could be inferred, then, that the type of store patronised by Asian and West Indian ethnic shoppers, was to some extent a function of 'ethnic' store ownership.

The patronage of small stores was consistent with the previous studies, which remark on their proliferation in the inner-city market areas, as a service function, especially to 'provide for needs of Asian shoppers', with different tastes (Rex, 1967; Piper, 1977), by merchandising selective food lines. Similar patronage patterns in favor of small ethnic-run stores have also been observed for American ethnic groups, particularly the Chinese-Americans (Light, 1972), the Spanish-speaking, Hispanic American groups (Forkan, 1979), and, also, in the case of black-American shoppers (Bauer and Cunningham, 1970).

The significant patronage of ethnic independents serves to point to the fact that, they have built up neighbourhood trades through emphasising 'ethnic' product dominance, as the main selling feature of store promotion. Consequently, it could be expected that they owe their strength to ethnic budget staples which are specific to Asian shoppers and, therefore help to maintain healthy profit margins, eventually comparable to the product sales in white-oriented multiple chains. A second reason that could be advanced in their

favour, is the sale by small independents, of perishables and green groceries which do not necessarily pose as economic propositions for large scale retailing. Important in this context, Mintel 1978 research revealed that, the 'greengrocery' shop was stated by 48 per cent shoppers, to be the 'main source of purchase of greengroceries'. The situation was thus assessed in Mintel's, 1978 remark, as follows:-

"Independents are competing much more effectively in the green grocery and fresh foods trades - personal service is much more important and standardisation of merchandise much less feasible than in grocery.... Small shopkeepers are therefore able to compete on more equal terms because multiples have not yet succeeded in translating the economies of scale implicit in their size of organisation to establishment level..."

Ethnic independent stores thus appear to have taken advantage of a flexibility in adjusting store product strategies to Asian ethnic grocery needs, in contrast to the centralised discipline of larger, discount chains. Strikingly, this '....common sense management approach' (Jackson, 1979), characterising the merchandising operations of ethnic independents, is noted to have emerged as a result of 'the rural small store roots that are characteristic of ethnic groups' (Coyle, 1975).

On the side of retailers, the disproportionate penetration with regard to ethnic retail outlets implied, moreover, that the latter have built up referent power bases of influence

over ethnic shoppers, which could be considered the result, primarily, of a shared identification between Asian retailers and shoppers, thus allowing them the differential advantage of appealing to Asian segments. Consistently, the influence of Asian shopkeepers was noted previously by Anwar, 1979 and, is also described in a similar vein, for the success of merchandising policies employed in ethnic food service delicatessens, in a Progressive Grocer, 1975 review:-

"Ethnic merchandising... owes itself to the amalgamation of theatrics, insight and intuition about the local ethnic market and product presentation. The close identification of product mix to the specific ethnic clientele allows.. ethnic neighbourhood stores, though ... inefficient, possessing few of the size or scale economies that supermarkets offer.., to retain customer loyalty for their ethnic character."  
(p.105)

Studies on the communications function, which envisages the dyadic correspondence of salesmen and customers, substantiated findings that, the more similar the buyer and seller in background and language, the more likely the sale can occur and, the greater the possibility of retailers obtaining an established position (Robinson and Prudin, 1971), within the market.

With regard to the shopper patronage of multiple chains, the present findings gave evidence that the latter are catering to a mixed shopper clientele, which is predominantly white, along with a substantial proportion of West Indian ethnic



shoppers and a smaller proportion from the Asian ethnic group. It could be inferred that, it was obviously the patronage of small independents by Asian ethnic shoppers, that has kept the chains and supermarkets from drawing in shopper patronage for all three ethnic groups. Consistent with the advantage possessed by Asian ethnic retailers, the functioning of smaller independents, in a general context, was contrasted with the lack of initiative, coupled with the impaired flexibility of centralised chains (Martineau, 1958).

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This was detailed adequately, in an assessment by Doody
~~~~~  
and Davidson, 1964 as below:-  
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"The independent approach, with its own distinctive style of individuals... is the toughest kind of competition that discounts face... It is tough to fight an individual, or a hundred individuals, all shooting at you from a hundred different directions." (p.71)

While this explained the patronage of ethnic-run grocery independents by Asian ethnic shoppers, it did not detract from the greater differential advantage enjoyed by discount chains due to their patronage by white shoppers, as well as a higher proportion of the West Indian group. Consequently, it could be expected that, the greater buying power of multiples will always allow them to undersell ethnic independents, due to their increased size and consequent economies of scale.

A sizeable proportion of Asian ethnic shoppers were also evidenced as patronising supermarket grocery outlets. It was inferred that these were indicative of recent ethnic

'supermarket' developments, that are a visible manifestation of the new distributive patterns beginning to emerge among Asian ethnic retailers. This was taken to imply that, any increase in ethnic market size (Chapter 4), would facilitate the natural tendency of ethnic independents to increase in sales volume, and, further expand their ranges of ethnic product merchandise. Previous trends in retailing, give ample evidence of this change. Thus, the search for cost reductions and increases in profits is known to result in the transformation of independents to self service units, with consequent reductions in capital and operating costs, which are subsequently passed on to customers, in the form of lower prices. This allows for the further progression of self service units into supermarkets, with an increase in selling area to the minimum supermarket size of 2000 sq ft (British Board of Trade, 1971; Retail Business, 1982). While supermarkets traditionally relied on their 'food' sections to draw in the majority of customers, and give a competitive edge over higher priced, 'department' stores (Retail Business, 1973), most of the larger supermarket outlets have moved in recent years, into the more non-traditional, 'non food' items (toiletries etc.), on certain considerations, namely, that non-food item sales are growing faster than food sales. Trading margins on non-foods are also known to be much higher than for food. Thus, while 30 per cent margins are typical for non foods, the margin for food is not much more than 12 per cent. A recent Mintel, 1978 assessment of the retail grocery trade as it affects the independents, goes

as follows:-

"The independent grocer is expected to continue to lose share. As the supermarket momentum continues, the independent operator inevitably suffers alongside the smaller high street supermarket operations. He may retain his convenience factors as a general corner store, but this depends very much on a favorable location. Evening and Sunday opening and a delivery service helps, but the volume trade in stable items is being lost to multiples. Specialisation in delicatessen may offset the general demise... "

The importance of the delicatessen market, which has its roots in ethnic product mixes, cannot, in this context, be overlooked. Studied by Mintel, 1979 under the guise of 'exotic' foods, it included items such as 'olive oil, garlic, curry powder, tomato puree, coleslaw, ground coffee, pizza and continental cheeses.' Excluded were foreign foods such as 'Chinese, Indian and other dishes'. Despite the ambiguity in definition, the market was estimated by the Delicatessen and Fine Foods Association (DAFFA), at £400 million in 1978. The above research also indicated that, delicatessen have been increasing at 10% per annum in volume terms. However, growth in this sector is expected to be slow because the individual markets tend to be '..too small to justify large marketing investment by any one company, while the total delicatessen market is too fragmented and complicated to be attractive to a large company to tackle as an entity...'

Even so, it could be anticipated that, by the end of the 1980's, the delicatessen market, as well as ethnic

supermarkets, will be a much more important part of the British food scene. In view of these facts, the changing nature and size of ethnic store operations is particularly relevant to the food retailing industry, the latter itself being an example of an innovative sector, lending itself to large-scale methods of distribution.

SECTION 9:7 ~~~~~

ETHNIC STORE LOYALTIES ~~~~~

Single store loyalties (measured as the proportion of shoppers who made 90% or more purchases at one outlet), had been estimated at 35 per cent for Asian ethnic shoppers, much lower than the value estimated for white shoppers. The findings pointed to the fact that, despite disproportionate retail patronage observed for Asian ethnic shoppers towards ethnic independent stores (evidenced also, for detergent purchasing in Chapter 5, Section 5:4), ethnic retailers seem to have gained the loyalty of Asian and West Indian shoppers by pandering to ethnic tastes via typically 'ethnic' product-mixes. In comparison to larger multiples however, they still appeared to lose out on full ranges of product variety. Consequently, it was to be expected that, single store loyalty levels in the Asian ethnic group were a function of ethnic linguistic and cultural identities created by intangibles such as the 'ethnic' store atmosphere and appeal, for different Asian ethnic sub-groups.

Direct selling can also be considered to have given ethnic retailers the advantage of developing contacts among Asian ethnic shoppers on a more personal plane than large scale retailing would allow and, therefore served as the primary competitive edge, in maintaining store loyalties within this group. These findings were consistent with the fact that, Asian entrepreneurship itself, owes its success to the strong community ties (Eglar, 1960; Wakil, 1970; Khan, 1976); and the close-knit trust element crucial in drawing customer loyalty. Evidence of the trust and loyalty elements making for entrepreneurial success, was also noted in the case of black Negro groups such as the 'Father Divine's' religious subsect (Sowell, 1979); which offered a striking contrast to the business failures found to occur among black US groups in general, despite being financed lavishly by federal government programs, yet lacking in the crucial trust element necessary for their success.

The high proportion of 'dual store loyalty' among shoppers within the Asian ethnic group, was strongly indicative of the changing conditions in ethnic retail patronage. This would also appear to be inherent in the greater mobility of Asian ethnic shoppers as evidenced in high car-ownership levels (Chapter 6); coupled with their tendency to purchase groceries at more competitive prices and, also seek wider ranges of the grocery product mix, than those catered for by small ethnic independents.

Store loyalty levels for the West Indian ethnic shopper group, again tended to differ significantly from the white group. To some extent this could be explained by the absence of West Indian ethnic independents, similar to the types that have proliferated for the Asian ethnic groups. West Indian ethnic shoppers would, therefore, be more prone to patronising multiple chains than the Asian ethnic group, with tendencies to fluctuate between large multiples and small ethnic stores, especially in view of the more competitive price structures.

Despite higher levels of West Indian ethnic and white shopper store loyalties, along with the patronisation of large multiples, it can be asserted that, multiple chains, like all large retail outlets, have been propagated forward mainly by continuing to imitate each other in mass merchandising strategies, and assuming that ethnic grocery needs are standardised according to the needs of white shoppers. Thus, the prototypical supermarket can be considered to have a very different product assortment from that existing for ethnic retail outlets. This is evident in Doodly and Davidson's,
~~~~~

1964 remark:-  
~~~~~

"The mass-merchandising techniques that have applied the concepts of high volume, service curtailment, standardisation of operation to their respective grocery businesses (much in the same manner as Fords), have resulted in shoppers being processed at the checker as if part of an assembly line passing through a work station." (p.73)

The prevalence of such strategies would imply that, Asian and West Indian ethnic linguistic groups have only weak impressions and store loyalties to multiple food chains which, in the main, have neglected the provision of ethnic product mixes. In contrast, ethnic independents were found attracting considerable ethnic patronage. It could be asserted, then, that in the future, degrees of ethnic shopper loyalty will depend on the extent to which ethnic retailers become competitive enough, via the development of successful marketing programs.

INTERACTION OF STORE TYPE WITH STORE LOYALTY

On the basis of the above, it was evident that in the case of the white shopper group, a significant proportion:-

1. Were female shoppers
2. Exhibited single store loyalty
3. Purchased groceries at a multiple chain store (mainly Tesco's)
4. Made 'weekly' grocery purchases
5. Did not use a car or public transport
6. Spent less time in transit
7. Were satisfied with the retail outlet frequented

An overall assessment of these factors would imply that, the lower mobility of female shoppers, coupled with convenience of location of multiple chains at competitive prices, allowed

for ease of grocery shopping at one outlet, obviating the need to travel to more distant outlets. These findings were consistent with the fact that the greater proportion of inner-city white shoppers are in lower income groups (with lower levels of car ownership). Previous research indicates, moreover, that shoppers in the middle-income, white collar occupational groups are more disloyal than those in lower income groups, again, owing to their greater mobility (Martineau, 1958; Tate, 1974). In line with these findings, Caplovitz, 1967 has provided evidence that low-income black shoppers are also more store loyal due to lower mobility levels.

A combination of the same factors for the Asian ethnic group, indicated that, in comparison to white shoppers, it comprised a high proportion who:-

1. Were male shoppers
2. Exhibited 'dual store loyalty'
3. Purchased groceries at a small 'ethnic' grocery store
4. Made 'fortnightly'/'monthly' purchases
5. Used a car for grocery shopping
6. Spent comparatively more time in transit to the retail outlet
7. Were satisfied with the retail outlet frequented most regularly

Taken together, these variables would serve to imply that,

the higher mobility of male shoppers, coupled with the greater use of car transport for grocery shopping, caused the Asian ethnic group to be less store loyal than white shoppers. It could be speculated that, the situation was exacerbated by the inadequacy of fully stocked merchandise lines in smaller ethnic grocery stores. Paradoxically, lower levels of ethnic store loyalty appeared to interact with high levels of retail patronage to ethnic-run independents. To the extent that preferences for ethnic run outlets (regardless of 'store loyalty' levels), have in the past, been indicative of their contribution to the economic potential of black businesses via programs of 'black capitalism' in depressed neighbourhoods (Huff, 1963; Simon and Alexis, 1974; Cox, 1969), the results of the present investigation imply that, Asian ethnic retail shopping patterns, especially in the inner city areas, will continue to remain segmented on the basis of the convenience and preference appeals, promoted by ethnic businesses.

SECTION 9:8

ETHNIC STORE IMAGE PERCEPTIONS FOR 'REAL' & 'IDEAL' STORES

ASIAN ETHNIC SHOPPER PERCEPTIONS

An analysis of 'real' and 'ideal' store ratings, had made apparent the fact that, in contrast to the white group which rated Dimension III, or 'Product Pricing' as significantly lower for the 'real' in comparison to the 'ideal' store, the Asian ethnic group had not rated the 'real' store patronised,

as different from the 'ideal' store on any of the seven store image dimensions, namely 'Store Appearance', 'Store Location', 'Product Pricing', 'Product Quality', 'Range of Merchandise Selection', 'Store Personnel', or 'Patronage by Friends'.

Specifically however, the Asian ethnic group had rated the 'real' store as significantly lower (and to the more negative end of the scale), on eight items, namely 1,12,13,17,24,27,28,32,34. In contrast, white ratings had been significantly lower on items 1,5,6,7,9,11,12,13,15,23. It can be seen that the 'real' store was perceived as significantly lacking, in comparison to the 'ideal' store, by both shopper groups in common, on item 1 ('store cleanliness'), item 12 ('store location') and item 13 ('time required to reach store'). In addition the Asian ethnic group also perceived a significant shortfall in the 'real' store on six items, 17,24,27,28,32,34, namely 'prices charged', 'variety in product range', 'liked by friends', 'courtesy in personnel', 'friendliness in personnel', and 'patronisation by friends' (dealing mainly with the store pricing, product mix and personnel dimensions), while the white group found the 'real' store short on seven entirely different items, 5,6,7,9,11,15,23, i.e., 'product display', 'spacing', 'layout', 'ease of moving', 'checkout speed', 'ease of parking' and 'good/bad product buys'.

These findings pointed to the fact that, while Asian ethnic

shoppers lay greater stress on dimensions of 'Product Price' and 'Retail Store Convenience' (similar to the white group), they also emphasise the importance of store patronage items such as 'product range', 'store personnel', and 'store clientele'.

The white group in contrast, was significantly more concerned with the dimension on 'Physical Appearance of the Store'. The results thus confirm the evidence in Section 9:1, that a ~~~~~ a significant proportion of Asian ethnic shoppers patronised small independent retail outlets emphasising ethnic owner appeal, compared to white shoppers who significantly preferred larger multiple chains which give more emphasis on 'price' and 'physical appearance' attributes. On the basis of the assumption that 'real' store ratings represent ratings for the most preferred retail outlet, the findings indicated that since Asian ethnic shoppers differed from white shoppers on the critical ratings given to store items considered important, they would, therefore, constitute significantly different target segments.

This was further confirmed by a comparison of 'real' store concept ratings for the Asian ethnic and white groups. These had indicated that the Asian ethnic group rated image dimensions I,II,IV,V,VI,VII, as significantly lower than the white group, with the 'Pricing' dimension the only one for which there were no perceptual differences between the Asian ethnic and white groups. Here too, the 'Pricing' dimension

was accorded an overall lower rating by the Asian ethnic group, but more favorably rated with regard to item 19 ('special prices'). Moreover, while differences in Asian ethnic 'real' and 'ideal' store ratings on 'Product Pricing' were not significant, white group ratings for 'real' and 'ideal' stores were found to be so, implying that the store pricing dimension was less favorably evaluated by the white group. Previously conducted empirical studies on white shoppers indicate that the 'real' store concept is closely related to shoppers' self-concepts, because shoppers will choose the retail store that best fits the self concept (Martineau, 1958; Doody and Davidson, 1964; Birdwell, 1968; ~~~~~ Dolich and Ross, 1969). Consequently, it can be considered ~~~~~ that 'real' store ratings accurately measured the underlying motivation dictating retail patronage among shopper groups. On this basis it could be inferred that, since the Asian ethnic group was significantly more critical in comparison to the white group (as evidenced in the lower ratings attributed to six of the seven store image dimensions), it therefore constituted a shopper segment requiring relatively different levels of promotion for effective targeting.

A detailed consideration of the differences in item ratings had indicated that, Asian ethnic shopper ratings were significantly lower on items 4,6,7,14,20,23,24,26,27,34. In other words, Asian ethnic shoppers expressed more concern than white shoppers on 'ease of finding items', 'merchandise spacing', 'product layout' (Physical attributes of the

Store), 'ease of driving', 'product dependability', 'good product buys', 'variety in product range', 'stock turnover' (Product Mix), and 'personnel courtesy'. The lower ratings would imply that, these aspects of retailing require considerable improvement in small ethnic-run independents, which are disproportionately patronised by Asian ethnic shoppers because of their ethnic appeal.

In fact, the very differences in mean ratings for item 27 ('personnel courtesy'), only highlighted the fact that, Asian ethnic shoppers were more sensitive to crucial nonprice intangible factors, that make for store personality.

Ultimately, ofcourse, the similarity in Asian ethnic and white ratings on dimension III ('Store Pricing'), would imply that this constituted the common denominator for both ethnic and white shopper groups, and, one that can be successfully manipulated by retailers, in drawing ethnic and white patronage and, thus enlarging store clientele.

WEST INDIAN ETHNIC SHOPPER PERCEPTIONS

The evidence had indicated that the West Indian ethnic group differed significantly from the white group, only on dimension VII ('Patronage by Friends'), in striking contrast to the Asian ethnic group which had rated all except Dimension III, as significantly lower.

On specific items, the West Indian ethnic group attributed significantly higher ratings for items 6 and 7, 'product spacing' and 'layout', but significantly lower and more critical ratings for items 10,15,31,32,33,34, i.e., 'store pleasantness' (Physical Attributes of Store), 'ease of parking', 'known to friends', 'liked by friends', 'recommended by friends', and 'patronised by friends' (Store Clientele). This would lead to the conclusion that the 'Store Clientele' dimension does constitute an intangible factor, of critical concern to West Indian ethnic shoppers.

Consequently, intangible aspects could be considered as differentially more important as reinforcements for retail patronage among ethnic groups. Research by Sexton, 1971; Hills and Granbois, 1973, on black ghetto shoppers, similarly indicated that store atmosphere dimensions were considerably more important than price, for black, as compared to white shoppers. It is obvious, then, that the more critical consumer perceptions become, the more the dimensions that constitute intangible aspects, will serve as the basis for assigning differences between shopper groups. The findings were also consistent with previous research (Bullock, 1961; Caplovitz, 1967), indicating that black shoppers preferred black owned retail outlets, because of the higher degree of identification and gratification afforded, with tendencies to view store image itself, as an 'intangible, vague, amorphous phenomenon based on their psychological states...'

The differences were also consistent with findings by Caplovitz, 1967, that black shoppers were not concerned about actual prices paid. However, they contradicted any assertion that blacks might be disadvantaged in pricing policies, as indicated by the small and insignificant differences in ratings for the 'real' and 'ideal' stores. It can be concluded then, that small ethnic independents do not charge significantly higher prices, as compared to discount chains. In fact, it could be asserted that inner-city ethnic retailers compete with larger stores, mainly on the basis of price, due to little in-store merchandising as well as virtually negligible consumer advertising. This in turn leads to minimal overhead costs, low labour differentials, with higher profitability and, also, lower perceptual price images by ethnic shoppers.

Lastly, the 'product quality' dimension had been rated similarly by West Indian ethnic and white shoppers. These results were consistent with previous findings that black shoppers are as quality conscious of the merchandise they purchase, as white shoppers. This was also indicated in the case of black American shoppers, by Smith, 1975, as quoted by Coyle, 1975:-

"Blacks are... suspicious of low prices because of being ...burned too many times by cut rate promises, and hence go for the high quality product image...even if they think the prices are high."
(p.25)

In conclusion, the evidence indicated that, the competitive edge of ethnic retail patronage derived consistently from ethnic product-mixes and store personalities, based as they are on service and clientele factors, rather than from store layout or pricing dimensions. This would seem to have resulted in the existence of differential ethnic store images, due to the injection of individualised personalities into ethnic retail stores (particularly the small independents), based on customer needs, personal involvement, and high levels of personal selling, clearly different from those characteristic of large scale retailing.

In contrast, the lack of concern and individual attention characterising mass retailing policies has, in the past, caused ethnic shoppers to be seen as '... a homogenous mass, with price as the dominant factor, and a consequent lack of the concept of product differentiation, in appealing to different market segments...'. (Doody and Davidson, 1964, ~~~~~~ p.74). It remains to be seen whether present ethnic differences are an aberration within the retailing system, and merely a period of transition, or a more enduring and permanent feature of segmented retailing. So far however, ethnic shopper patterns can be considered to have successfully differentiated themselves from the pattern of mass market conformity, by their distinct cultural characteristics.

FUTURE ETHNIC RETAIL TRENDS

Any assessment of future retail trends in the grocery market, cannot overlook the importance of the ethnic independents, in inner-city market areas which justify their existence. The fact that small shopkeepers are capable of holding out on their own, was, in fact, highlighted in a Mintel, 1979 assessment, as indicated below:-

'..The high rents in new properties are making conditions extremely difficult for the small operator.. The independent shopkeeper will have a place.. ..if he is both efficient and provides products or services which meet the needs of a sufficient number of people in the locality.."

The trend towards multiples will, none the less, continue. The domination of the total retail trade by multiples, is now a well known fact (Mintel, 1979; Market Research Great Britain, 1982). Existing estimates thus gave the total retail trade distribution as follows:-

TABLE 9:3

MARKET SHARES OF RETAIL GROCERY TRADE, 1980

| <u>MULTIPLES</u>
(1980) | <u>CO-OPERATIVES</u>
(1980) | <u>INDEPENDENTS</u>
(1980) |
|----------------------------|--------------------------------|-------------------------------|
| 43.8% | 6.7% | 39.2% |

SOURCE: NIELSEN, 1980; MARKET RESEARCH GREAT BRITAIN, 1982

In a general grocery context, it is noteworthy that, with regard to turnover, independents still control more than half the total volume. In fact, on a strictly comparable basis, the position of independents was revealed more clearly, when absolute figures were transcribed into proportionate shares of the number of outlets and their turnover, as indicated below for the decade ending 1971:-

TABLE 9:4

TYPE OF ORGANISATION & TURNOVER
~~~~~

<u>ORGANISATION</u>	<u>OUTLET</u>		<u>TURNOVER</u>	
	1961	1971	1961	1971
	%	%	%	%
COOPERATIVE	5.4	3.1	10.9	7.2
MULTIPLE	12.3	13.9	29.2	39.8
INDEPENDENT	82.3	83.0	59.9	52.9
	[100]	[100]	[100]	[100]

SOURCE: MINTEL, 1979

It is obvious then, that independents' market share declined at a much lower rate than for the cooperatives, and, in fact, that the proportion of outlets they controlled, increased slightly. Mintel 1979 research further noted that the inclusion of operators of market stalls and mobile shops in the 1961 Census, and their exclusion in the 1971 Census, may have misled many commentators into exaggerating the decline of independents. Even so, it cannot be denied, that future trends point unmistakably to the expansion of multiples. This is again noted in Mintel, 1979 reviews:-

".. As regards gross margins, the independents are worse off in every trade... The evidence of the relative importance attached by multiples to capital expenditure on new stores and equipment, must surely presage an acceleration in their trend towards gaining a larger market share. The difference in other operational yardsticks - shop turnover, sales per square foot, stock turn and staff productivity - is very noticeably in the multiples favour."

Areas where multiple penetration is already high, namely the grocery, clothing and footwear trades, are, therefore, being fast characterised by disparities in performance. The existence of ethnic shopkeepers, as in the case of all independents, will, in the future, therefore, be least promising, particularly where standardised operational techniques favor their expansion into larger retail outlets. Consequently, their continuation within the retail trade will most likely be characterised by an expansion into supermarket outlets and, would, therefore, be typical of what is happening at the moment, with the multiples growing, the cooperatives more or less static and the independents declining, though still retaining a substantial portion of the market. This was aptly summed up in a general context, but also applicable to ethnic retailing, in the following remark by Hall, 1973:-  
~~~~~

"... The number of very small shops and independents, and their share of the trade is falling and will do so at an accelerating rate... Yet the contraction will be essentially a net change not only of small traders into and out of retailing, but of the development of smaller retailers into larger ones... "

SUMMARY AND CONCLUSIONS TO CHAPTER 9

In this chapter, an attempt was made to assess the significance of the differences that characterise Asian and West Indian ethnic, and white shoppers in their retail patronage characteristics.

SUMMARY

1. MARKET CONTROL

The Asian ethnic group comprised only 27 per cent female shoppers, significantly lower than the proportion of women (98 per cent), shopping regularly for groceries in the white group. The proportion in the West Indian ethnic group (95 per cent), was, however, similar to that for the white group.

It was concluded that marketers are targeting a significantly male, grocery shopper market in the Asian ethnic segment, in comparison to predominantly female shoppers within West Indian ethnic and white shopper groups.

2. SHOPPER DEMOGRAPHY

Shoppers in the Asian ethnic segment (78 per cent), were distributed over the lower age groups (25-34 yrs and

35-44 yrs), and D/E socioeconomic categories. 59 per cent of the Asian ethnic group were in the £4000-£4999 income category compared to 20 per cent white shoppers. Similarly, shoppers in the West Indian ethnic group comprised a lower age group (25-34 yrs), with 77 per cent in the D/E and F socioeconomic groupings. 45 per cent were in the lower income ranges (£3000-£3999), compared to 4 per cent white shoppers in this range. In contrast, the white group was distributed more evenly across all age group submarkets, and had a higher proportion in the AB and C1/C2 socioeconomic categories.

It was concluded that Asian and West Indian ethnic segments constituted different demographic shopper markets, so that retailers are targeting ethnic submarkets within predominantly lower age, social class and income structures.

3. A significant proportion of shoppers in the Asian ethnic group (48 per cent), used the car for grocery shopping, compared to 8 per cent white shoppers. Additionally, a higher proportion also spent longer time intervals (5-10 minutes), in transit. In contrast, the greater proportion of shoppers in the West Indian ethnic and white groups preferred to walk to the retail outlet frequented most often.

Within the Asian ethnic group, then, greater use of the

car as a mode of transport, as well as travel to more distant retail outlets was apparently preferred in order to obtain groceries at more competitive prices.

4. GROCERY SHOPPING FREQUENCIES

Significant proportions of shoppers in the Asian (31 per cent), and the West Indian (9 per cent), ethnic groups purchased groceries at 'fortnightly' or longer intervals in comparison to a much higher proportion (91 per cent), of the white group who made 'weekly' shopping trips.

5. STORE LOYALTY

Asian and West Indian ethnic shopper groups also contained significant proportions (58 per cent and 14 per cent respectively), patronising the small, ethnic run independents, in comparison to only 2 per cent in the white group. The latter patronised significantly more supermarket and multiple chain (primarily Tesco's) outlets.

However, Asian (55 per cent), and West Indian (27 per cent), ethnic shoppers exhibited more 'dual store loyalty' in comparison to a significant proportion (93 per cent), of 'single store loyal' white shoppers.

It was concluded that, though ethnic independents attract

the patronage of Asian ethnic shoppers, they retain the 'hard core loyalty' of a much smaller proportion. In contrast, the larger multiple chains attract significant West Indian ethnic (64 per cent), and white (93 per cent), patronage and also succeed in holding shopper loyalty due to competitive food pricing policies that differentiate them from the small independents.

6. RETAIL STORE PERCEPTIONS

PHYSICAL CHARACTERISTICS OF STORE

Asian ethnic shoppers rated the 'real' store significantly lower on this dimension, in comparison to the white group. The difference was not significant between West Indian ethnic and white groups. Specifically, Asian ethnic shoppers rated the 'real' store as significantly lower on 'ease of finding items', 'merchandise spacing', and 'product layout'.

It can be concluded that, an improvement in the product spacing and layout policies in ethnic stores would better retain Asian ethnic store loyalties. Alternatively, it would cause ethnic retail stores to operate on more competitive lines and, simultaneously make for Asian ethnic store switching behaviour, in favour of better and more competitive retail outlets.

In contrast, West Indian ethnic shoppers rated the regular store significantly higher than white shoppers on 'merchandise spacing' and 'store layout'. Consequently, these factors could be considered critical in holding West Indian ethnic shopper loyalties to regularly patronised retail outlets.

For all three shopper groups, there were no significant discrepancies in overall ratings for the 'real' and 'ideal' stores on this dimension. Evidently, existing retail policies for 'regular' stores patronised, did meet ethnic and white shopper requirements.

CONVENIENCE OF STORE LOCATION ~~~~~

Asian ethnic shoppers differed, in rating the 'real' store significantly lower than the white group, on this dimension, but significantly higher on the item, 'ease of driving'. It was obvious that Asian ethnic shoppers would switch from distantly located 'regular' stores, if more conveniently located outlets are provided in the neighbourhood retail areas. Since there was no significant discrepancy between 'real' and 'ideal' store ratings on this dimension, it was also clear that, Asian ethnic shoppers preferred to use stores at more distant locations in order to get appropriate product mixes.

West Indian ethnic shoppers did not differ significantly

from white shoppers on 'real' store ratings. Apparently, retail outlets patronised were more conveniently located than those used by Asian ethnic shoppers, so that there would be comparatively lower tendencies to switch from regularly patronised stores.

STORE PRICING ~~~~~

Asian ethnic shoppers perceived their 'regular' store as selling more items on 'special prices', compared to white shoppers. It was concluded that special pricing could serve as important in holding shopper loyalty for the lower income ranges among Asian ethnic groups.

Evidence of Asian ethnic store loyalties due to pricing policies was reinforced by the fact that, while there were no significant discrepancies between 'real' and 'ideal' images for the Asian ethnic group, there was a significant difference in 'real' and 'ideal' image ratings for white shoppers, implying that the latter were more price conscious and, significantly more critical of store pricing policies than ethnic shoppers. Thus, Asian ethnic shoppers perceived store pricing as similar to 'ideal' store standards, and white shoppers, higher, while this latter group did not differ significantly from West Indian 'real' store pricing perceptions.

Store pricing was apparently more important in holding

white shopper loyalty (or, alternatively, in causing store switching behaviour), but less important among Asian ethnic shoppers where ethnic retail appeals function as confounding factors that prevail over and above ethnic retail pricing policies alone.

PRODUCT QUALITY ~~~~~

Asian ethnic shoppers differed in attributing significantly lower ratings than the white group, for the 'Product Quality' dimension on the 'real' store, specifically on items, 'dependability of products' and 'good/bad product buys'. However, Asian ethnic ratings showed no significant discrepancy between the 'real' and 'ideal' stores on this dimension. It was concluded that within lower income constraints, Asian ethnic shoppers did not expect the high quality grocery items that white shoppers expect, so that, product quality of itself, would cause less store switching than for white shoppers.

West Indian ethnic and white shoppers did not differ significantly, in image ratings for grocery product quality. There were also no significant discrepancies between West Indian ethnic 'real' and 'ideal' store ratings for this dimension. Product quality, by itself, was evidently not likely to result in greater store switching behaviour for West Indian ethnic, rather than white shoppers.

MERCHANDISE SELECTION ~~~~~

Asian ethnic shoppers differed significantly from white shoppers in giving lower ratings on this dimension, specifically on 'variety in product selection'. This was reinforced by the discrepancy in 'real' and 'ideal' store ratings for this item. It was concluded that though Asian ethnic shoppers were satisfied with ranges of product selection (as indicated by the insignificant difference in 'real' and 'ideal' store ratings on this dimension), shopper loyalty could, none the less, be enhanced by increasing product selection ranges for ethnic groups in higher income ranges. This would have the added advantage of greater ethnic store switching behaviour due to broader and more competitive ranges and variety in grocery product mixes provided.

West Indian ethnic shoppers, however, did not differ significantly from white shoppers in the product selection range for the 'regular' store patronised. From this, it appeared that retailers could gain West Indian shopper loyalties more easily than for the Asian ethnic groups.

STORE PERSONNEL ~~~~~

The Asian ethnic shopper group differed significantly from white shoppers, in lower ratings on this dimension,

though there were no discrepancies between 'real' and 'ideal' store ratings for both groups. It was concluded that Asian ethnic shoppers were more critical of the service aspect of grocery shopping, which could, therefore, enhance store loyalty or, alternatively, encourage store switching behaviour by its absence.

West Indian ethnic shoppers did not differ significantly on image ratings for this dimension. Apparently, then, the service aspect was not very different for holding West Indian ethnic or white shopper loyalties.

PATRONISATION BY FRIENDS

Asian and West Indian ethnic shoppers differed significantly from white shoppers in giving lower ratings on this image dimension for the 'real' store. The 'patronisation of friends' was thus, evidently a significant factor in causing store switching behaviour or, otherwise, in retaining store loyalties for ethnic groups, and would be enhanced by the number of friends shopping at the same store.

From these findings it can be conclusively argued that, Asian ethnic shoppers, because of income and socioeconomic constraints, had consistently lower images of 'real' stores patronised, in comparison to white shoppers using the same

market area. Since 'real' and 'ideal' store images overlapped closely in each group, this would imply that store images as they exist at present, do not elicit much store switching behaviour among ethnic groups, mainly because of the absence of more competitive retail stores. However, marked discrepancies between 'real' and 'ideal' store images on 'range of merchandise', 'product layout' and the 'service' aspects of personnel courtesy, implied that the Asian ethnic group was more sensitive to elements comprising store service, and patronage by significant reference groups.

In perspective, product-mixes, more than 'store lighting' or 'store appearance', have served as competitive factors in ethnic store selection, as evidenced by the greater patronage of Asian ethnic shoppers to small ethnic independents. However, neither the extent nor weight of the consideration has been realised by white retailers, because the problem is marred by culture-centric attitudes expecting a uniformity in ethnic and white retail patronage patterns to prevail. This has only clouded the situation, rather than contribute to any solution.

Sales growth by ethnic product diversification is, in fact, of as yet less immediate concern. This is because ethnic retailers are invariably sited in inner-city areas, and do little competitive store image advertising. This is interesting in its managerial implications, in view of the stress on newspaper advertising by the mass market chain

retailers.

Store personality created by the service and clientele elements was, none the less, a crucial factor in making for retail patronage. Ethnic retailers could be said to have capitalised by combining these two elements with the common element for both groups, namely 'store pricing', into a flexible merchandising approach, in contrast to the lack of initiative and creativity that characterises large retailers.

They thus appear to have attracted considerable ethnic patronage due to selling low priced merchandise, with very little branding. This would be applicable, particularly for food products, imported at low prices and sold at competitive prices, allowing wide profit margins. Consequently, it could be considered that, the success of ethnic retail patronage was based on informal marketing techniques, in which loyalty and trust elements have dictated customer-retailer relations, and, also, made for channel loyalties as opposed to channel conflict, across wholesalers and retailers. These dual elements have allowed for economically efficient and, optimal coordination within the ethnic retailing system, giving it a competitive edge over white retailing.

However, in its existing state, ethnic retailing can only be considered an antiquated distributive system, dominated by small independent retail outlets. It has very little food product branding or retail price maintenance, and high ethnic

patronage but relatively lower levels of ethnic store loyalty. There is an obvious lack of managerial ability and, ethnic retailers have not had the money to set up either sophisticated inventory and accounting systems or advertising programs. Given these circumstances, the extent to which it becomes a major competitive factor, will depend on how the problems of grocery product quality and merchandising are resolved, through innovation and product diversification.

Assuming that Asian and West Indian ethnic market sizes continue to grow, along with simultaneous increases in ethnic consumer spending, the decades ahead will see an inevitable rise in competitive ethnic retailing activities. In their present state, however, the significant strengths in ethnic retailing and customer patronage remain hidden and unnoticed by the white retailers.

CONCLUSIONS TO PART III

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In Part III of this thesis, the segmentation concept was operationalised, by considering the ethnic groups with regard to the UK laundry detergent and the automobile markets. The product categories were taken to represent extremes along the purchase decision time continuum. It was postulated in Part I that, for the ethnic consumer groups to serve as profitable market segments, they must satisfy the basic criteria for effective segmentation strategies, i.e. they must be 1) 'substantial', in terms of providing a profitable market for selective targeting, 2) 'measurable', by way of possessing distinct cultural consumer characteristics, and 3) 'accessible', in terms of effective focusing of marketing efforts through sales and promotional media.

The accumulated research evidence leads to certain generalisations. First, that at least for selected product classes, there is disproportionate product penetration within the ethnic market segments, due to cultural as well as demographic factors. The decision-making structure characteristic of the Asian ethnic segment was thus based on informal patterns of information acquisition as well as a large amount of retailer influence. At a comparable level, purchase decisions characterising the West Indian ethnic segment were largely independent, or else made use of the commercial market media as sources of information.



Second, the informal mode of information processing of product attributes within the Asian ethnic segment, led to disproportionate penetration not only of product categories per se, but also of brands, not necessarily the leading brands within the white consumer market. The more formal use of the commercial media in the West Indian ethnic segment resulted, in contrast, to a polarisation of brand preferences, with an inordinately brand loyal group of consumers at one end, aspiring to 'prestige' and 'quality' brands which are also the leading brands in the white market and, at the other end, to a large group of consumers with no strong brand loyalties but, brand preferences a function of economic and price considerations.

Additionally, the 'ethnic' print and broadcast media were found to have significant penetrations within the Asian ethnic segment. The 'ethnic' broadcast TV and radio programmes in particular, were found to serve as vehicles reaching a broad Asian ethnic audience covering a diversity of linguistic subgroups, by appealing to commonalities in cultural conditioning, based on ethnic origin. Given this evidence, it cannot be denied that ethnically oriented publications and programmes had the undoubted advantage of filling a communications gap, which the white oriented media have not done so, as effectively.

Lastly, the Asian and West Indian ethnic groups were in each instance characterised by significantly different 'self' and

'ad' concepts, in comparison to the white group. This made for evident differences in 'image' concepts, for the same brand.

These generalisations highlight the fact that, though phenotypical and skin colour differences might serve as the basis for product differentiation at a rudimentary level, they prove, on closer examination, to be far from decisive in focusing marketing strategies, for any product field. Rather, differentiating ethnic characteristics hold much greater force in demarcating ethnic groups with regard to the socio-cultural variables that affect product purchasing behaviour.

In order to strategically focus on these segments, therefore, marketers would need to consider a host of diverse factors comprising ethnic linguistic and religious orientations, product literature, informal retailer influence, all of which also affect entry into 'foreign language' markets. While the groups are effectively contributing to the maintenance of brand shares in the UK consumer market, it cannot be considered that marketing policies and practices as they exist, are in any way emphasising or retaining the competitive edge that manufacturers' brands already possess within these markets.

PART IV  
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CHAPTER 10

IMPLICATIONS OF THE ETHNIC DEMAND
STRUCTURE

CHAPTER 10 ~~~~~

IMPLICATIONS OF THE ETHNIC DEMAND STRUCTURE ~~~~~

INTRODUCTION ~~~~~

Ethnic groups have, till now, been studied in the form of material that has been primarily historical and sociological in content. The thesis here, applied an analytic marketing framework, in examining them on the criteria for segmentation. It argued that on a comparable basis, the Asian and West Indian subsegments would yield greater profitability in product and brand sales, if targeted separately by marketers. The following sections of this chapter, next include a discussion of the policy implications resulting from their differential preference patterns.

SECTION 10:1 ~~~~~

IMPLICATIONS OF ETHNIC DIFFERENCES FOR PRODUCT STRATEGY ~~~~~

The differences highlighted in this study, i.e., disproportionate product consumption of certain product categories, secondly, preferential choice behaviour for certain brands and, thirdly, the differential importance given to certain product and brand attributes, implied that there is an ethnic factor (or race), causing black and other ethnic groups to allocate consumption expenditure so that

they spend less than whites on some goods and more on others, for all income categories.

These findings were consistent with research by Bullock, 1961, who earlier indicated that cultural/racial differences lead to differences in motivation and, therefore, differences in consumption. Additionally, they relate back to two main points. First, it was asserted by Alexis, 1962, that there is a racial factor causing blacks to spend less than whites at all incomes, in other words, that black consumption would be inferior since they spend less, so that the regression line of Negro consumption would be continuously below that for white consumption. Later, it was suggested that there is a racial factor (Sawyer, 1962), which causes Negro consumption to be below white consumption at lower incomes but above white consumption for higher incomes. This causes the regression lines for consumption to cross rather than be parallel, so that at higher levels, Negro consumption exceeds white consumption.

The present study modifies the above two findings so that it can be postulated that, the marginal propensities to consume differ across ethnic groups so that they consume less of some product categories, and more of other product categories.

It could be speculated that, as ethnic marketing programs become more entrenched, the differences in ethnic-white product consumption patterns will become more obvious.

Policy implications following for product strategies, would then encompass two aspects:-

1. The expansion of consumer demand in the ethnic market segments
2. Broadening of product bases through product modification and development.

These are next discussed in detail below.

EXPANSION OF ETHNIC CONSUMER DEMAND

The ethnic market was projected to grow from its existing 4% of the UK market in 1980, to a stable 7% by the turn of the century (Section 4:2). Previous research on ethnic groups gives substantial evidence that the cultural reasons providing the basis, especially for ethnic food product dietary preferences, do not alter radically over time. This has been observed in the case of the US black market (Forkan, 1979); the Jewish ethnic segments in the UK (Piper, 1977); and US (Forkan, 1979); American Chinese and Japanese ethnic groups (Green, 1979); Hispanic Americans (Sinha, 1977; Forkan, 1979); and, also, the UK Asian and West Indian ethnic groups (Rex, 1969; Piper, 1977), thus giving ample proof that the ethnic segments constitute definable targets, for special product and brand positioning.

Given this background, it can be suggested that, the fact

that the ethnic groups might wholly determine the success and failure of certain product categories would imply, consequently, significant increases in competitive activity, with growing ethnic consumer demand.

PRODUCT MODIFICATION AND DIVERSIFICATION

Yet another aspect with implications for product marketing strategies is, that ethnic products would attract more clients as they expand in their appeal to the white consumer market. It would need to be remembered, however, that Asian product mixes are traditional in formulation, appealing mainly to ethnic consumers. Innovative ranges of ethnic products through modification and ethnic diversification, could in the future, therefore be considered to allow for more stable and broadened economic bases for ethnic products, than presently existing. Innovation in the ethnic product mixes however, would require substantial R & D expenditure for product development and, also the simultaneous development of product information bases through market research on ethnic consumption preferences.

It can be concluded that existing product strategies and execution leave much to be desired and, would need significant improvements in order to compete profitably with sophisticated marketing plans for white-oriented product categories.

SECTION 10:2
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IMPLICATIONS OF ETHNIC DIFFERENCES FOR ADVERTISING STRATEGY  
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It was indicated in Part II, that Asian ethnic consumers constituted a cultural segment with differential preferences for ethnic appeals, and, therefore, more easily accessible through ethnic print media. Attitudinal differences towards advertising appeals implied, moreover, differences in ethnic value systems. It was argued that this has significant implications for advertising strategies designed to selectively target the Asian segment. In fact, the existence of different value systems, as they exist within the 'rural societal structure' of Asians, was asserted by Jacobson, ~~~~~ 1978, as below:-
~~~~~

".... emphasis is placed on the mutually exclusive, as indicated by the phenomenon of purdah, a form of sex-segregation which allows a social-psychological symbolic shelter. This is a characteristic of major importance which must be confronted at every turn... and found to be a practised norm in Muslim religious groups and also in some segments in Indian society."

While differing value systems within the Asian ethnic groups have been forwarded as an explanation for their 'incapsulation', which also serves as a binding factor against corruptive urban forces (Barth, 1969), they also make ~~~~~ for a predominantly separatist outlook, found to be more effective in mobilising ethnic support among Muslim groups,



in contrast to integrationist philosophies (Dahya, 1972).  
~~~~~

This was, moreover, noted specifically by Mayer, 1977:-
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"...The question of values is important for people might conform outwardly, but still remain inwardly determined to revert when opportunity arises. The internal value preferences prevent the majority in the ethnic groups from coming out of their incapsulation..."

It must be noted that, such value systems are typical of backward food/agricultural economies from which the ethnic groups originated and, are also associated with non-aggressive yet demanding work ethics, in order to facilitate growth (Mayer, 1977).  
~~~~~

A sharp contrast is provided by Western value systems, with advertising a social apparatus, whereby the capitalist leisure and consumption ethic replaced the original work ethic. It was thus described by Hoch, 1979 as follows:-
~~~~~

"The media's constant reenactment of the rites of sport and social entertainment, has given the Western man of today an orientation which could best be described as characterised by intense striving for achievement, competitiveness, impatience, a constant awareness of the pressure of time..." (p.99)

And again,

"... Closely linked to racism through consumerism, the modern fetish for commodities expresses an alienation from the mind, its increased quantification, a predilection for linear measures, a preoccupation with quantitative accumulation and

consumption, the individual as opposed to the collective., and the absence of cognitive faculties..." (p.99)

Predictably, this style of competition appears, as yet, out of place within the ethnic value systems. Different religious and cultural values could be said, rather, to have imposed on the whole complex of ethnic social interactions, a manifest need to defend and perpetuate ethnic identities (Barth, 1969; Dahya, 1972). This was substantiated in the current research findings, which indicated a significant interaction between ad appeal, ethnic religious orientation, gender and origin. Two important aspects noted were, first, that ethnically oriented appeals were significantly preferred by the Asian ethnic group, and, secondly, that ads using female models were rated significantly higher by female respondents, with 'product-only' ads rated significantly higher by male respondents. Policy directives would therefore tend to ensue, along lines involving:-

1. Selective targeting of ethnic segments through 'ethnic' ad appeals.
2. Use of neutral, 'product-only' ad appeals, for ads directed at general consumer markets. This would serve an effective strategy for targeting ethnic as well as groups, through the general white media.
3. Use of 'segregated' ad appeals in which female models be used only for advertisements directed at female product consumption. This would allow for greater congruency of

'self-image' and 'ad-image' concepts, as was indicated by the 'Gender'X'Ad appeal' interaction.

#### SECTION 10:3

#### IMPLICATIONS OF ETHNIC RETAILING DIFFERENCES

The Asian ethnic group had been found showing a differential preference for Asian ethnic retail outlets. Two major implications that retailing strategies would need to consider, follow from this, namely:-

1. An increase in ethnic retailing with ethnic market growth
2. Increase in competitive activity, with increased ethnic retailing

Both aspects derive from the very nature of ethnic retailing, characterised as it is, by the element of vigorous entrepreneurship (Rex and Moore, 1967; Patterson, 1970; Gupta, 1977). The potential strength of ethnic retail businesses lies, moreover, in the fact that they are primarily a service industry, flexible to changing demand structures, thus ensuring them to be areas of growth. They therefore have characteristics of the service and small manufacturing industries, that marked the period of rapid and precocious industrialisation during the post World War II era. Again, like the service industries, ethnic retail

businesses were found concentrated in the more prosperous South-East of England, primarily in the West Midlands and London areas that have been increasing in wealth, because of the dynamic and innovative nature of their industries.

Such contrasts become all the more vivid, when compared to traditional manufacturing industries localised in the North and North East England, and which have been steadily declining. Characterised as they were, by coal field economies, the traditional economic structures had been largely oligopolistic, denied the tradition of widespread enterprise characteristic of the service and small manufacturing sectors (Tothill, 1961; Cameron and Clark, 1966; Clark, 1966). The oligopolistic nature also denied the traditions that have made small capital readily available to small entrepreneurs, therein acting as a factor deficiency, that hindered the survival and industrial adjustments of the large manufacturing industries. Their sprawling geographic localisation next to sites of raw materials, also hindered their easy mobility. Manufacturing industries have, moreover, had to face severe and increasing overseas competition and, an increased national propensity to import because of dampened aggregate demand, coupled with the declining demand for domestic manufactured products and, an underutilisation of labour and capital in the already less prosperous and declining regions (Dennis, 1978: Department of Industrial Research).

Against this backdrop, it could be stated that the most important potential factor contributing to increase in ethnic business activities, is their concentration in service industries, namely banking, shipping, retailing and insurance, in the South, South-East and London areas, where the ethnic consumer population is concentrated.

These latter areas have long served as sites for expansion of the service sectors, amenable as they are to changing entrepreneurial activity and, requiring the substitution of capital machinery by labour. In fact, the innovative activity and leadership of these regions was explained on the fact that, the concentration of people in the South East rather than the North allowed the regions to serve as nodal points for the transmission of ideas. Their more cosmopolitan character due to greater regional mobility, has, accordingly, also permitted them to serve as testing grounds for new innovations. They have therefore had the advantage over the North, both, in terms of information maximisation as well as risk minimisation, with a bias towards new and potential growth sectors.

Consequently, traditional inner-city manufacturing industries - namely, the garment, clothing, furniture, printing, specialised engineering have been declining, along with a shift to the suburbs, of the expanding growth manufacturing industries, among them, the durable goods, non-metallic manufacturing, electrical and photographic equipment,

transportation, professional activities (Kasarda, 1976).  
~~~~~  
This has left the inner cities to regenerate their economic
bases on the service utilities, particularly the sales and
retail trades (Stanbeck, 1974; Thompson, 1974; Quante, 1976).
~~~~~  
The service industries have, therefore, continued to expand  
in their potential with regard to basic and non-basic  
services, particularly the retailing, education and health  
services, as well as financial institutions such as banking  
and insurance, which regulate economic activity and, also  
have international roles of importance to Britain's domestic  
economy (Thomas, 1970).  
~~~~~

Arguably, investment in the South East and Midlands was
spurred by regional aids, provided under the aegis of the
EEC. Thus, the South East and Midlands, though prosperous,
ranked only 17th in income per head by EEC figures, with a
gross domestic product only 40% of the richest EEC regions.
As a result, regional aids have continued to propel new and
profitable industry in the South East, rather than prop up
inefficient and outdated manufacturing enterprises in the
North and North East. Here, in substantiation of the
economic growth of the South East and Midlands, it was found
that 50% of Britain's net personal income was from these
regions, with 31% of the total population localised there.
(Dennis, 1978: Department of Industrial Research). In the
~~~~~  
light of these factors, there can be no doubt that the  
service industries of the South East and Midlands would  
reflect similarly, in time, on the potential growth and

increase in wealth of ethnic service enterprises, also concentrated in these areas.

The potential growth of the Asian ethnic economy would, moreover, evidently lie in the inherently self contained nature of ethnic enterprises. It was argued in Chapter 9, that Asian and white economic activities had the characteristics of being mutually separatist and, functionally complementary in providing goods and services for ethnic groups. Ethnic business structures therefore, appear to be contributing to a self-contained economic system in obtaining jobs, housing, credit, through their own network. In contrast, the West Indian ethnic groups have been seen as an essentially dependent category, with no necessarily internalised collectivity and, therefore, more 'racial' than 'ethnic', because of their economic dependency (Shibutani and Kwan, 1965; Krausz, 1972). This situation was described by Anwar, 1979, with regard to the Asian ethnic groups:-

"... the importance attached to self employment... in terms of prosperity, independence, respect and discrimination, was a contributory factor... Added to this, the spirit of united action... allowing for reliance on their own business and unity" (p.125)

The self-contained expansion of ethnic business activities was similarly elaborated on by Anwar, 1979, in reference to the garment trade in Manchester:-

"... peddling and hawking.... created a contact with manufacturers and wholesalers. Subsequently, this has led them to start their own manufacturing and supplying to the wholesalers, allowing them to keep the profits at all stages. This helped them to expand their business quickly." (p.130)

Needless to say, a contributory factor in this expansion, was the close-knit structure of the Asian ethnic groups. This was again described by Anwar, 1979 as follows:-  
~~~~~

"The informal and personal network has allowed for initial capital raising within the group, and to rely subsequently on the institutionalised sources of finance for further expansion of the business infrastructure." (p.128)

Insights into ethnic wholesaler-retailer channel contacts are also evident, in Anwar's, 1979 argument below:-
~~~~~

"Personal retailer-wholesaler contacts have allowed for credit facilities... and common arrangements between manufacturers and market traders allow for payments to the manufacturer later on, and also to allow return of unsold goods." (p.128)

It would appear then, that ethnic business contacts across channels have consequently resulted in their concentration within certain industries, allowing for greater collaboration and mobilisation in the success of ventures. Concentration in specific industries appears, in particular, to have allowed for 'home-working' as an economic device to cut overheads and, therefore, to make Asian ethnic business activities more profitable and competitive in terms of labor-cost differentials. Evidence for Asian concentration in



certain business industries was also given by Anwar, 1979, who indicated a 35% concentration of Asian groups in the textile and metal manufacturing industries in the Manchester area, compared to 2.5% for the white UK population. A similar concentration was again evidenced in the Bradford area, with a concentration of 26% Asians in the textile and metal manufacturing industries, compared to 2% for the white consumer population.

An additional factor making for the success of Asian ethnic enterprises could be considered their localised activity in areas of high ethnic concentration, invariably inner-city twilight zones. While this allowed for a high index of compactness (Anwar, 1979), added significance obtains from the fact that, high group density would serve in high measure, as the extent to which information could be transmitted within Asian business activities and, consequently accommodate ethnic groups to novel ways and innovations, as was noted earlier, for the South-East region as a whole. Existing evidence has indicated that, ethnic clustering is the result of voluntary 'incapsulation' (Barth, 1969), leading to the concept of the 'defended neighbourhood' (Lyons, 1972; Ray, 1973), arising as this does, from a similarity in value systems (Duncan and Duncan, 1955; Tilly, 1961; Lieberman, 1963; Ukeiji, 1964; Mawley, 1971; Foley, 1973; Mariette, 1973; Erbe, 1975; Farley, 1977; Guest and Weed, 1977; Simlus, 1978). That the geographical clustering of groups is affected by lifestyle differences, was also

asserted by Straus, 1961; Gans, 1962; Keller, 1968;  
Michelson, 1970; Tirms, 1971; Scuttles, 1972; Popenoe, 1974.

Yet another reason forwarded to explain the clustering of ethnic groups, was their tendency in the past, to locate close to the work place. Characteristically, this meant a concentration of ethnic, racial and also low-income white groups, next to industrial areas in inner city zones. Such localisation is considered to have typically followed the 'principle of least effort' (Carroll, 1949; Schnore, 1965; Katz, 1968; Wheeler, 1968), according to which, it is indicated that the poor are location oriented and, would stay near their work place.

It could be asserted that, these diverse aspects contributing to ethnic clustering have, in turn, led to 'segregated ethnic neighbourhoods', where Asian ethnic groups have been able to demand the creation of retail outlets, providing specialised goods and services required by ethnic lifestyles, on the basis of cultural characteristics. Retailing and business activities thus appear to have been inherent in the clustering phenomenon. In segmentation terms, this would mean that the accessibility of ethnic groups for purposes of sales distribution, as well as media promotion, can generate acceptable volumes of product-brand sales within localised market areas, thus allowing for greater profitability and ethnic product specialisation, with consequent regeneration of Asian ethnic economic bases within inner city areas.

In perspective, these intrinsically dynamic properties of internal mobilisation and internal self-organisation could be said to have caused ethnic economic strategies to be pursued with a high level of autonomy and congruence, and little possibility of future economic assimilation. This would imply that, as ethnic businesses increase with growing market demand, there would be an increase in competitive activity at the microeconomic level within the Asian ethnic structure and, at the macroeconomic level, between Asian ethnic and white retailers, in attempting to obtain larger shares of the ethnic consumer buying power.

Despite the advantageous fact that the spatial clustering of Asian and West Indian ethnic groups appears to have provided for profitable ethnic business activities, it can be considered to have presented a complex set of urban difficulties. It is well known that inner city areas are pockets of stress, characterised by a Victorian inheritance (Barber, 1981) in the age and condition of housing, and, declines which have shown little signs of being halted since the World War I period. They are therefore characterised by economically stagnating environments, deterioration, and industrial dereliction (Howard, 1904). This problem was widely recognised as prevailing in the large conurbations of the West Midlands, Manchester, Merseyside, as well as the inner city areas within London, Newcastle and Birmingham (Hunt Committee Report, 1969). Social and economic costs have therefore been generated, originally by an excessive

concentration of ethnic as well as low-income white groups, the resulting overcrowding and poor health, and the inability of the areas to adjust adequately, their land use to suitable contemporary roles. What has resulted in these areas, are therefore, formless, unrestrained urban sprawls, defying the provisions of infrastructures and public services at reasonable costs.

It has been argued, moreover, (Christian, 1975), that the suburban relocation of small manufacturing industries and, the consequent drop in economic opportunity, would mean that black workers particularly, will continue to be concentrated in inner city areas due to an inability to find suitable suburban jobs. In fact, this was repeatedly evidenced as a causal factor in the high levels of residential segregation between American blacks and whites, within similar income and occupational groups (Erbe, 1975; Wilson and Tauber, 1975; Greer and Greer, 1976; Farley, 1977; Schnore, 1977).

Despite a need for economic and ecological regeneration of inner city areas, state and local government efforts to restructure the areas have nevertheless been geared by motives dictating speculative state profitability (Birmingham Community Development Project, 1980). While this resulted in an increase in commercial trading in derelict areas, thus increasing the profitability of private companies with vested interests in the property market, it simultaneously damaged the viability of shopkeepers, due to the marginal nature of

inner-city residential areas. In fact, it was suggested that, since warehousing and cash and carry activities generate less well paid jobs than the ones replaced, and also generate more heavy vehicle traffic associated with such activities, this would have the effect of increasing rather than alleviating inner city environmental and health problems. Under such circumstances it is possible that in the future, neighbouring and more profitable shopping centres might attract investment by ethnic shopkeepers presently located in inner-city areas. Also, it was argued that, since it is expensive to build new housing on inner-city land because of the costs associated with razing old buildings (Greer and Greer, 1976), any increase in socioeconomic status, and living standards, would result in an outer flow of ethnic consumers to the suburbs, housing costs and property taxation entailed in the central city being more than those of equivalent quality on the periphery, where public services required are fewer (Oates, 1969; Quigley, 1974; Primus, 1976).

In substantiation of this latter argument, a shifting pattern was noted, to some extent, for the Asian (Ballard, 1976), and again, in the substantial dispersal of West Indian ethnic groups throughout the London conurbation (Pettigrew, 1973; Peach, 1975). The combined effect of such factors, and, the imperfect market mechanisms operating in inner-city areas imply therefore, that far from being concentrated in incipient ghetto areas, ethnic groups will modify their

geographic distribution over the 1980's and 1990's.

Trends in ethnic retailing and consumer patronage therefore give every evidence of the closure of small shops over time, and the expansion of others into larger retail outlets. This is, furthermore, inevitable in view of trends observed for small shops within the general retail context. Detailed figures for the UK retailing structure over 1961-1971, indicated (Doody and Davidson, 1964; Board of Trade, 1971), a decline from 67% to 58%, of very small shops, an increase by 20% in the small shops with 4-9 employees and, as a consequence, in the proportion of all small shops by 6-8%. However, there was a greater increase in the proportion of medium-sized shops from 27% to 34%. The very large shops also increased by a small 1%. With large shops, however, a small change can mean a large change in the overall equilibrium of retail power. It can be expected therefore, that there will, in time, be a similar polarisation in ethnic retail establishments, given the benefits of the economies of scale associated with large retailing operations.

The reshaping of ethnic merchandising and promotion policies will also be evident, as their bargaining power increases. Support for future trends towards large retailing in general, was provided by Cox, 1969 on the argument that, if excess potential capacity in inner-city depressed neighbourhoods, characterised by the three-fold aspects of low consumer incomes, high unemployment rates and high vacancy rates is a

common phenomenon, then, any private enterprise government programs to stimulate small business in the ghetto areas may be misdirected.

In such a situation, Cox, 1969 argued that encouraging more small merchants might be the worst possible strategy. It would be far more productive to encourage the development of larger stores by either expanding existing stores or, alternatively, attracting larger stores to ghetto areas, to make for more efficient retailing in depressed neighbourhoods.

It is reasonable to predict then, that Asian ethnic retailing will increase as a competitive force within the white macroeconomic retailing structure, rather than remain confined to a 'ghetto marketing' phenomenon, along with the negative externalities arising from the noxious effects of commercial and industrial land uses in inner-city areas.

#### SECTION 10:4

#### IMPLICATIONS OF AN ENLARGEMENT OF THE DEMAND STRUCTURE

This section next considers the impact of ethnic market growth, as it would affect the demand structure. Since the decades ahead envisage an increase in the size of the ethnic consumer market, the demand structure can be simultaneously projected to increase, based on two considerations.

1. Increase in Ethnic Buying Power
2. Expansion in the Ethnic Market Demand Structure

It could be speculated that, as ethnic market size increases, there will be a concomitant increase in buying power. This however, would necessarily be subject to increases in ethnic consumer incomes, which might take either of two courses, namely:-

1. A rationalisation of the ethnic occupation and income structure by legislation. Since however, this is a complicated bureaucratic procedure, it would affect marketing policies only to the extent of allowing for increases in ethnic consumer spending.
2. As an alternative consideration, it could be argued that increases in ethnic consumer spending would be an associated facet of the long-term expansion of Asian business enterprises.

Two important aspects that could be considered as contributory to this expansion are, first, the fact that the Asian ethnic economy in the past, built on a self-sufficient framework, with specialised services being provided to ethnic consumer groups. Ethnic retail units therefore have a near monopoly over the Asian segment. Second, the major portion of the ethnic economic base has been generated by the sale of Asian ethnic food product-mixes, imported from the home countries (Piper, 1977). Since these make for imports at  
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cheap prices and are sold, subsequently, to leave large profit margins, an expansion of ethnic consumer market size would, therefore, increase the significance of the import function in ethnic retailing. This can be visualised, as shown overleaf, in Figure 10:1.

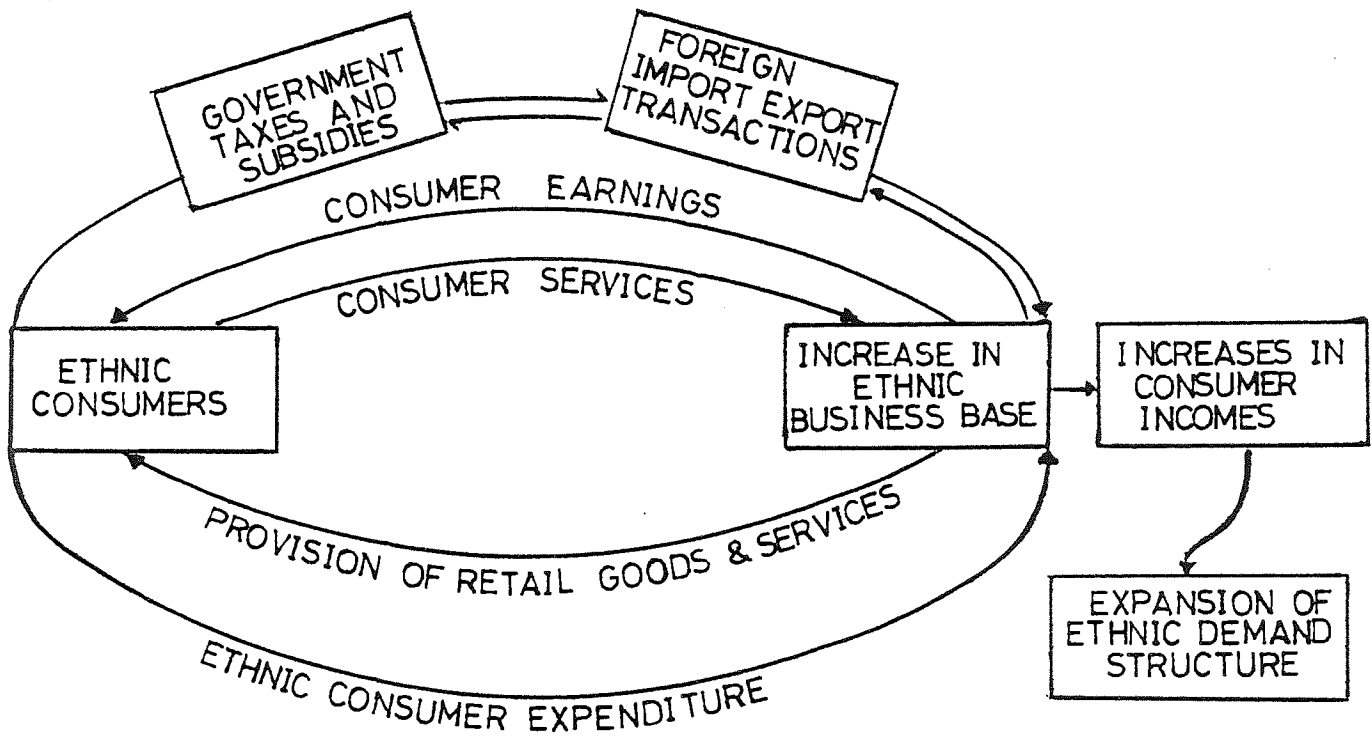
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An expansion of the ethnic demand structure, therefore, can be envisaged as taking two directions. First, further increase in ethnic market size (population projection trends), would dictate that there be an increase in the demand for ethnic products. These being specific to ethnic tastes and preferences, ethnic consumers would continue to constitute the core segment at which ethnic product-mixes would be targeted.

Second, it could be considered that, there would be an enlargement of the demand structure, arising from a tendency to switch resources between ethnic product-mixes on the one hand, and products directed at the white consumer market on the other. However, this can be envisaged only at higher incomes, where the marginal utility and satisfaction obtained by switching resources would be greater than the satisfaction obtained by consuming merely increasing quantities of the ethnic product-mix.

FIGURE 10:1  
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EXPANSION OF ETHNIC CONSUMER DEMAND
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SOURCE: Adapted from Harbury, C., (1980), Economic Behaviour, 'Supply and Demand in the Market for Goods', p.104

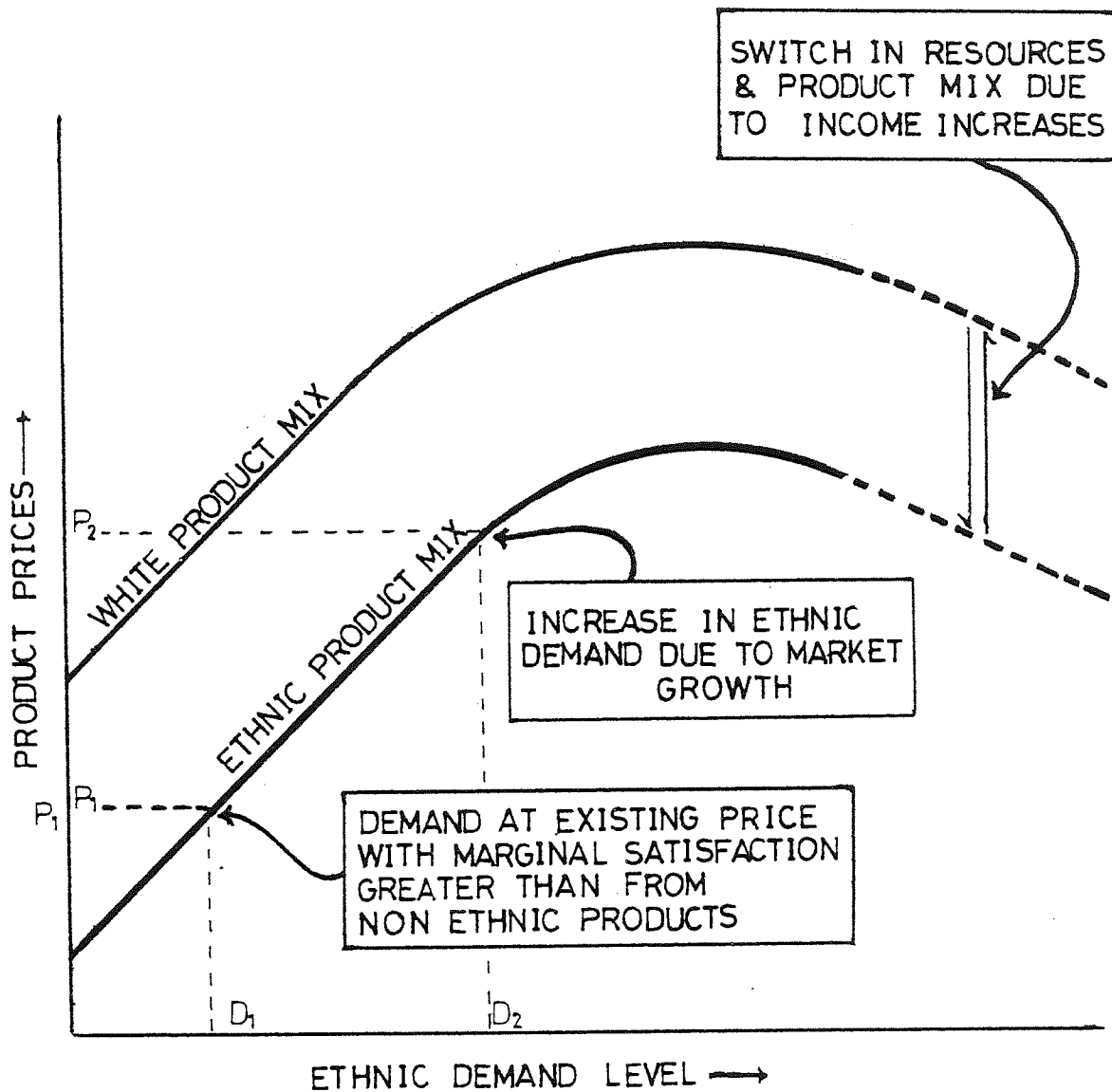
Moreover, since ethnic segments presently supplied are essentially small, with an associated absence in ethnic retailing of economies of scale, any increase in demand for ethnic products with increased market size, can be considered to cause an increase in ethnic product prices, because of the greater costs of servicing entailed. Accepting that consumers are cost-conscious entities, this would imply that they might continue to buy ethnic product mixes only so long as the marginal utility (in terms of the marginal satisfaction due to distinctly ethnic preferences and tastes), remains greater than the utility to be derived from products oriented to the white market. The impact of these inter-related factors, in making for an enlargement of the demand structure, is described in Figure 10:2.

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As the situation exists at present, however, white-oriented consumer products that have penetrated the ethnic markets, are those originally aimed at the white middle class segment (eg. Van den Berghe's blue band margarine because it uses vegetable, rather than edible oils). Similarly, ethnic products that have penetrated a small section of the white market (researcher's observation), are targeted at the middle-class segment that has higher disposable incomes (eg. Schwartz oriental spices). Any enlargement of the demand structure would, therefore, need to take into consideration the crucial part played by ethnic and white income distributions, in order to allow scope for diversification in ethnic product demand.

FIGURE 10:2

VARIATION IN LEVELS OF ETHNIC CONSUMER DEMAND



SOURCE: Adapted from Harbury, C., (1980), Economic Behaviour, 'Supply and Demand in the Market for Goods', p.61

POLICY RECOMMENDATIONS

Considering the set of investigations in this thesis, it could be concluded that the Asian and West Indian ethnic groups constitute distinct market segments in terms of product purchase patterns and characteristics. However, in order to optimally avail of ethnic consumer demand as it exists within the macro marketing structure, certain policy considerations would need to be injected into the system.

RATIONALISATION OF ETHNIC CONSUMER INCOMES

On the basis of the product categories examined, it was concluded that both, Asian and West Indian ethnic groups are 'heavy user' segments, at least for some product categories. Despite disproportionate consumption, a comparison of ethnic and white demographic structures indicated that income distributions were weighted significantly towards the lower income end, for Asian and West Indian ethnic groups, compared to the white population. It could be argued here, that since consumer spending is directly subject to incomes, a rationalisation in favour of ethnic consumer incomes is a major policy directive that should be given further consideration.

The need for this becomes all the more obvious in the light of the existing evidence on ethnic employment and income policies. According to present trends, it was found that as

the post war economies have grown, the earnings of ethnic groups have simultaneously benefited from the economic growth, though these were relative, only in comparison to past earnings (Dorn, 1979); and therefore meaningless in terms of absolute comparability with white earnings. Any impression of dramatic gains in middle-class black incomes therefore, continues to remain a statistical artifact that is couched in ambiguity.

Similar trends have been observed for present earnings for ethnic groups. Evidence from National Dwelling and Housing Survey, 1980, data thus indicated that, the Asian and West Indian ethnic groups do not compete equally vis-a-vis the white population in the job market, and also have higher unemployment rates (Barber, 1981). Similar evidence on black American groups also indicated higher unemployment levels in comparison to white consumers (Rothman, 1977; Dorn, 1979). Accepting that substantive inequality does exist between ethnic and white populations, the solution therefore appears to be to change the rules.

This would mean that if black incomes were smaller to start with, and have resulted in lower consumer expenditure levels, then raising black incomes would result in increased consumer spending. This latter fact was observed with regard to comparatively high levels of consumption and income expenditure, for middle-income vs low-income blacks (Dorn, 1979). However, for the majority of low-income consumers,

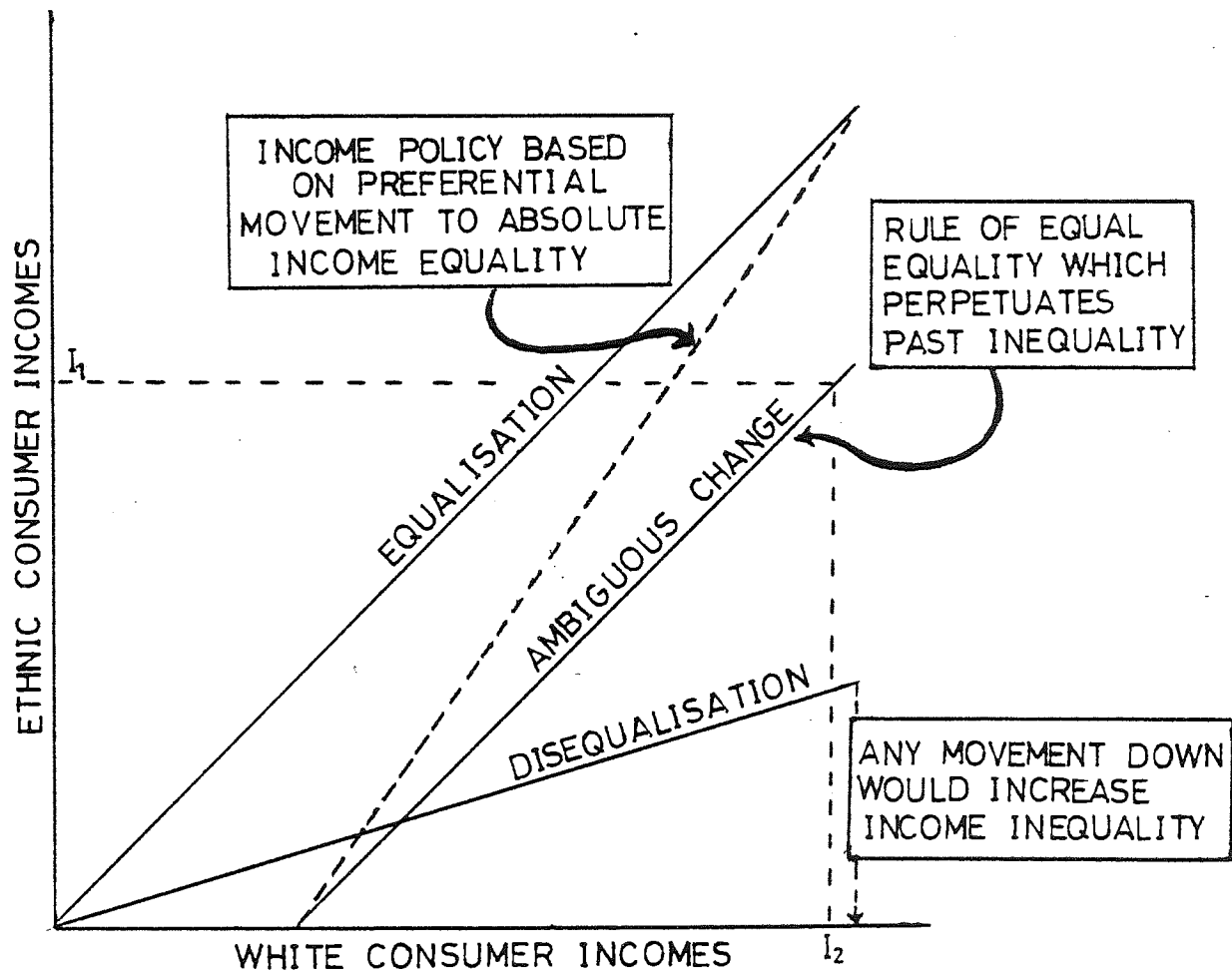
two facts must be observed. First, that under any rules of equal economic opportunity, if ethnic and white consumers are unequal with regard to income distributions to begin with, then equal opportunity would only perpetuate past inequality. In other words, substantive inequality would continue to persist over time.

Added to this, it is acknowledged (Sawyer, 1962), that there are many other forms of gain whereby white incomes accumulate far more than black wealth, namely the incomes earned from rents, interest and dividends, which appreciate more rapidly and thereby only serve to perpetuate past inequalities between blacks and whites. This would imply that equality in income distributions among ethnic and white groups is only possible if incomes are in favour of the worse off group. In other words, a period of compensatory bias would be required.

On the basis of this reasoning, it could be suggested, as speculated by Dorn, 1979, that ethnic groups be employed at a faster rate than the white population, with a move toward decreasing the absolute gap rather than perpetuating it, as explained in Figure 10:3 overleaf. It could be argued that, any such move is important, if the potential of the ethnic markets is to be realised through their contribution to the macro-economy, via consumer spending.

FIGURE 10:3
~~~~~

INCOME EFFECTS ON ETHNIC CONSUMER DEMAND  
~~~~~



SOURCE: Adapted from Dorn, E., (1979), Rules and Racial Equality, New Haven: London, Yale University Press, p.123

ETHNIC ADVERTISING & MEDIA RECOMMENDATIONS

An important aspect of the differences in ethnic and white orientations to media/advertising, included the differential preference patterns of the Asian ethnic groups, thus implying the need for selective focusing through the ethnic media, via ethnically oriented appeals. An unavoidable factor in this context is, that promotion to Asian ethnic groups especially, would be heavily dependent on the advantageous use of linguistic, religious and nationality characteristics. This has implications for the creation of ethnic advertising agencies as marketing tools. Though ethnic media exist, at present ethnic advertising has been mainly a specialist area, the domain of ethnic retailers and advertisers. It could be said that, real marketing expertise has not been developed, because while ethnic advertisers might be best qualified to communicate cultural ad appeals and devise media plans to reach ethnic consumers, their estimates of ethnic audiences being reached would at best be approximations and, operate moreover, on precarious capital bases generated by local ethnic retailers.

At the other end, advertisers aiming product promotion at the white consumer market, have not considered ethnic segments as large enough to be separately targeted through 'ethnic' media. In practical terms, this has meant that white marketers, even if apprised of ethnic-white differences, would not significantly alter existing promotional or media

strategies in order to target ethnic groups. It can be expected that, as ethnic market demand continues to grow, the use of all-purpose media strategies would prove costly and inefficient with low rates of return on investment, in comparison to more selective focusing provided by ethnic media. Success in reaching the ethnic groups can therefore be envisaged as lying in agencies who can effectively research the ethnic markets, and build up closer contacts through collaboration with ethnic advertisers.

Yet another disturbing aspect that Western advertisers would have to consider is that, while there has been a tendency to regard the Freudian consumerist paradigm uncritically, as holding the key to the problems of industrial society, it might not hold the key to advertising appeals directed to the Asian ethnic groups within their existing cultural and value systems.

If 'segregated ad' appeals incorporate a deeper and more fundamental philosophy, in contrast to western empiricism which advocates integration by and large, then the existence of ethnic differences based on this core concept, would emphasise selectively appealing to ethnic groups through segregated ad appeals. This would imply, specifically, that use of female models in advertising products for consumption by a largely male, ethnic market, both in terms of incomes and product consumption, as in the case of the automobile product category, would only result in a glaring lack of

congruency between ethnic 'self image' and 'product image' concepts.

Consistent with this theorising, it was asserted by Hoch, ~~~~ 1979, that, the spread of consumption values to the working ~~~~ classes has, in the past, only engendered confused value and belief systems, with the ultimates of the consumption ethic being fun, escape and excitement. It could be envisaged that, the spread of this consumption ethic to the ethnic market segments through the dominant mass media, will doubtlessly increase the demand for consumer goods. This would, however, paradoxically undermine the traditional work and production ethic characterising the Asian ethnic groups at present. It could be inferred that, as long as advertising strategies exhibit the tendency to be overly concerned with trivial problems of the leisure and consumption ethics, which ultimately abstract from the reality of the work ethic, there will be a clear disparity between advertising strategies adopted for targeting ethnic consumers, and their ability to communicate anything really meaningful within the ambit of ethnic value systems.

ONGOING ETHNIC CONSUMER RESEARCH ~~~~~

Additionally, there are a number of directions that future research would need to consider, in any analysis of ethnic market groups:-

1. Longitudinal panel studies over time, allowing for the study of variations in ethnic buying patterns over longer time periods, to support the cross-sectional analysis attempted in this investigation.
2. Analysis of consistency in ethnic purchase characteristics such as brand and store loyalty, across diverse product categories. This would be necessary in order to provide indications on whether ethnic consumers showing brand loyalty within one product category, express similar loyalty across other product categories.

Such studies would be significant for their implications on product market shares, and in opening up horizons for long-term ethnic marketing policies.

CONCLUSIONS

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## CONCLUSIONS

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The thesis here, was based on an investigation of the Asian and West Indian ethnic groups, to elucidate whether they constitute distinct segments in terms of their cultural 'measurability'. It further examined them on their 'substantiality' in terms of market size, and 'accessibility', through the media and related outlets. The null hypothesis was invoked that there were no significant differences between ethnic and white groups in their consumption characteristics.

In the first part of the thesis, it was theoretically established that the concept of ethnicity constitutes a combination of demographic and cultural variables, that describe and differentiate ethnic groups more accurately than any one variable taken singly.

The demographic indicators discussed in Part II, ~~~~~ sketched a profile of potential economic growth, especially marked in the case of the Asian ethnic segment which, by 1985, is projected to become the largest, and the West Indian, the second largest UK 'ethnic' consumer market. It is possible to envisage that, as marketing activity increases, with increasing ethnic market size, ethnic retailers would develop their own private brands, in order to compete effectively on a price basis. Increasing rates of stock turnover for ethnic products can also be predicted to pave the way for vertically

integrated structures, as ethnic retailers take over wholesaling tasks, in order to avail of reduced distribution costs. For white retailers, this implies that the more competitive the marketing of ethnic products becomes in the future, the greater would be the magnitude of the costs, in terms of foregone opportunities.

The set of investigations in Part III, pointed out that the Asian and West Indian ethnic groups do not comprise one undifferentiated, monolithic mass, but constitute separate cultural markets, owing to significant differences in their 'self-image' concepts. Ethnic personality characteristics can, therefore, be expected to provide a valuable criterion for profiling and segmenting these groups across a diversity of product fields.

Cultural influences were also clearly mirrored in product purchasing variables. Thus, the disproportionate consumption patterns provided ample evidence for the 'substantiality' criterion of market segmentation, as applied to the ethnic groups. The data on brand preferences and loyalties, indicated heavy penetration of Procter and Gamble's 'Daz', as the leading brand in the Asian and West Indian ethnic market segments, despite the established position of Lever's 'Persil', within the UK consumer market. For the Asian ethnic group, such brand preference patterns appear to have been shaped by the smaller preference choice sets evoked due to linguistic barriers and, also, due to the use of local

'ethnic-run' outlets, along with retailer influence on the purchase of specific brands. Here, a point of major importance for the UK laundry detergent market is the competitive activity that would be involved in the promotion of these groups as 'heavy user' segments.

For the manufacturers, this has strong connotations in the stress given by Asian retailers to 'instore' product promotion, and the shelf space provided to manufacturers' brands. A second, more important aspect of the Asian ethnic purchasing process, was the communication of brand information via greater use of informal 'friend' sources, within the ambit of the wider ethnic social framework, in contrast to the more objective, commercial sources used by West Indian ethnic and white consumers. However, such informal communication networks might, in the future, also be responsible for trends furthering ethnic brand switching activities.

From a public policy point of view, these findings raise the issue of why objective information from neutral market sources is not used more widely by Asian ethnic shoppers. Explanations advanced, could be based on the premise that Asian shoppers have different information needs and cultural preferences from white shoppers. This is further heightened by their linguistic barriers which do not permit wider ethnic usage of commercial sources of information, through the English language dominated media. Overall, such evidence

emphasises the importance of 'word of mouth' activity as a strategy for product acceptance within the Asian ethnic segment. At a more fundamental level however, it also indicates the need for improved product labelling and ethnic consumer education in the less well-known product categories, as alternative strategies for penetrating the ethnic markets.

Within the West Indian ethnic group, brand preferences were largely independent choice decisions, with very little activity involving informal 'significant' others as opinion leaders. This appears to have led to the formation of two major subsegments in terms of brand loyalty, causing it to bear a sharp resemblance to the black consumer market in the US. At one level it consisted of a small sub-core of consumers brand loyal to the market leader (Lever's 'Persil'), which is also the established leading brand in the UK white market. At the other extreme, there was a large sub-segment of consumers, 'brand switchers', with no strong loyalty to any particular brand, and 'price' the main motivating brand choice determinant.

For both segments together, this leaves no doubt that Procter & Gamble's nationally advertised brands have a significant competitive foothold within the ethnic market. Disproportionate consumption is however, product specific, and the results would need to be replicated across a broader range of product categories.

A fact of singular importance, highlighted with regard to the car market, was the significant penetration of Japanese 'Datsuns' among 'new car owners' in the Asian ethnic segment, in contrast to the penetration of French (EEC) car imports, among white car owners. Here again, the Asian ethnic segment was characterised by informal communication links, which had the effect of reinforcing overlapping brand preferences. The West Indian ethnic group comprised another distinct segment in terms of its consumer independence, as reflected in the decision-structure. Specifically, these results suggested that the Asian, and also the West Indian ethnic subsegments, constitute profitable targets for 'selective' car marketing, on their own.

Media usage patterns, again indicated differential preferences within the Asian ethnic group, for language publications which were additional to their consumption of white media. Since ethnic publications fill a gap because of their linguistic and cultural appeals, it could be expected that they will continue to exist in the future because of their complementary function, rather than due to any competitive activity. However, this does not detract from the fact that white media planners still have the responsibility for an adequate representation of ethnic groups through the white oriented channels of communication. In fact it can be concluded that white advertisers could use ethnic program preferences to reposition white TV shows, and promote neutrally designed ad-copy, so as to maximize

audience shares and, simultaneously target ethnic groups as self-selecting units within a heterogenous audience.

Future advertising policies also follow from the findings on ad effectiveness, which gave no evidence that either ethnic, or white consumers, would picture ads with ethnic models negatively. It was indicated, rather, that they would simply evaluate integrated and ethnic models ads about the same as white model ads. It would appear from this, that to the extent negative stereotypes of ethnic groups persist within the white culture, they have been the result of white media manipulation through advertising and news content. Positive affect under these circumstances, obviously depends on the way the Asian and West Indian ethnic groups are portrayed as media images.

This is particularly relevant when applied to the concept of 'integrated' advertising which, because it allows for a direct comparison of cultures, holds encouraging prospects as a policy for providing mass audiences with more factual information. This would also be a reversal from the earlier stance in advertising, which has followed a pattern, largely of ethnic exclusion. The implications of this are all the more considerable, given that their effective utilisation would achieve the broad social goal of portraying ethnic groups as part of the mainstream of white society, as well as improving existing ethnic stereotypes.

A potential factor that must be considered in policies of 'integrated' advertising, however, is that it may provide an information overload, since it is known that consumers tend to simplify their environments by keeping out discordant information and obtrusive cognitions. Accordingly, the information provided in integrated ads might reduce ad comprehension, depending on the degree of realism, as well as the prevailing cultural ethos at any point in time. Targeting ethnic groups on a business basis, consequently points to a short-term need for specialist 'ethnic' ads through ethnic media.

Within the ambit of both 'integrated' and 'segregated' ad policies, the more specific topic of female models in advertisements, appeared to evoke highly sensitive reactions from both ethnic and white groups. Given the dubious communications effectiveness of such ads, and the proven fact that promotional display material using models often leads to less content memorability and brand identification over time, such strategies are obviously not going to benefit industry problems in the long term. It can, therefore, be concluded that the use of 'product-only' ads would sustain a significantly more valid economic argument and also hold greater appeal for wider target audiences.

The consumer information processing of 'product-only' ads might also prove to be economically more useful in a post-industrial society, if it reveals the needlessness of

creating separate ad-campaigns using race-oriented models, in attempts to reach ethnic markets profitably. Ethnic advertising will, however, continue to remain a controversial phenomenon till there is more empirical published research clarifying prevalent assumptions on the communications effectiveness of models in ads. It could be suggested that ads with ethnic models be pertinent to short-term strategies aimed at enhancing product promotion through cultural visibility, but that ads with product principals be more effective in the long term, for products well established within the ethnic market.

Lastly, an assessment of ethnic retail patronage patterns made it obvious that ethnic retailers have generated a demand based on:-

1. Clearly recognising the existence of the ethnic segments.
2. Identifying the product-mix, service and price elements that interact to generate an appeal for ethnic owned stores.
3. Communicating in the language of the specific ethnic groups being targeted.

Commonality of language appears to have been an indispensable part of the economic success of Asian, ethnic-owned retail stores. Additionally, the specific appeals highlighted in store image profiles, with regard to 'store personnel' and 'patronisation by friends', for the Asian and West Indian

ethnic groups, indicated that these aspects are important from the managerial perspective of increasing consumer traffic and enhancing the rates of ethnic stock turnover.

However, the dimensions of 'store convenience', 'location' and 'pricing' were found to be common to store patronage for the Asian and West Indian ethnic and white groups. Statistically significant differences were not, in any case, expected over all store image dimensions, because retail food stores are known to operate quite similarly so that, in attempting to routinize shopping procedures and reduce risk, consumers are considered to choose the 'regular' store patronised as one of a competing set of stores. Consequently, the above differences in choice of retail outlet by ethnic and white shoppers, represent key factors in providing meaningful information on ethnic retail patronage, as well as in shaping retailers' merchandising programs.

In perspective, it must be remembered that ethnic retailing is as yet inefficient, with fluctuating store loyalties, and lacking the economies of scale that larger retail outlets possess. To reiterate what Sturdivant, 1978 emphasised:-

"..The ghetto retailing crisis is basically structural in nature. The retail communities in most ghettos are characterised by an atomistic structure with numerous small owner operated establishments serving the poor. Such firms lack the managerial sophistication, capital and capacity to service their market effectively.."

It is obvious that ethnic retailers are too small singly, to exert any perceptible influence on the UK retail market. Together, however, they obviously exert a monopoly over the ethnic segments, especially for Asian food product-mixes, which serve as the essential basis for differentiation. Since their geographical centres of gravity are the inner city areas, the existence of these retail outlets has not been given much importance. Even so, it must be accepted that Asian and West Indian ethnic preferences for products with ethnic appeal, act as a source of market power from which Asian ethnic retailers have drawn their competitive strength within the UK retailing structure.

Policy implications also derive from the fact that, the commercial success of Asian business structures appears to be based on 'group' loyalties, and the initial mobilisation of credit through communal support networks. This is contrary to the prevalent idea that capitalist enterprise must be inherently individualistic in order to be successful. As indicated earlier, the significance of informal communication structures, as described by Desai, 1963 for the Asian ethnic group, cannot be overlooked:-

"...At the superficial level, individual decision making is not in tune with the ethnic cultural ethos, because individual ambition and success are translated to mean improving the position of the group as a whole. The extensive informal structure thus provides support against the abrasive experience of making independent decisions..."

Ethnic retailing assumes all the more significance, in view of the fact that it is specifically a service function, based heavily on the import of Asian and Caribbean product mixes, oriented to cultural minority groups. It could thus be considered similar to the service industries which constitute the expanding portion of the post-industrial economy, namely the financial, banking and insurance services, professional and marketing activities, and import-export trading activity functions. For the time being at least, it thus appears to have effectively differentiated itself from the conformity characterising mass scale merchandising policies.

Nevertheless, ethnic retailing constitutes, as yet, a narrowly based economy, with the ethnic segments the major generators of their own sustained economic growth. An added weakness in the existing retail structure concerns Asian ethnic product mixes, where the main emphasis has been on product pricing, with quality standards leaving much to be desired. At the other extreme, the marketing of Asian product mixes within the white consumer market, has been based essentially on an incrementalist approach of muddling through, so that ethnic products marketed by white retailers cannot be considered competitively priced, in comparison to functionally equivalent products sold by Asian ethnic retailers.

Summing up this situation, ethnic marketing can be considered to have a potential rather than achieved utility, in its

demand implications for white retailers. Ethnicity itself is as yet an unfamiliar concept to British marketers, with ethnic buyer behaviour only inadequately formulated, and regarded more as a curiosity and form of deviance from white norms, than an important factor in its own. Ethnic market facts have, therefore, remained vague and amorphous, with the ethnic groups difficult to assess. Furthermore, white marketers have long been accustomed to 'white' ethnic European groups, for whom 'ethnic' cultures have served as optional extras, offering an additional identity within the Euro-British culture. For the Asian ethnic groups, the evidence indicates that the contrasting nature of their divergent religious and linguistic orientations, as well as their phenotypical and skin colour differences, delineate these consumers much more sharply than is the case for European ethnic groups. Even so, since ethnic variations are enduring cultural differences, the concept of ethnicity can, in fact, ultimately be said to provide the very basis for the 'sine qua non' of effective theorising, i.e., the formulation of a falsifiable hypothesis - and thus forward fundamental evidence for the effective segmentation of ethnic groups.

These results are interesting, because they provide a sound basis for differentiating ethnic consumer characteristics. Needless to say, much more objective research is needed to vindicate the points of view put forward in this study. Ethnic marketing at present, can be said to comprise a set of emerging practices rather than any explicit policies. How

ethnic strategies are shaped, still awaits further developments, based on the mobilisation of ethnic and white resources. The strategic and tactical issues therefore persist, and are replete with questions demanding further investigation.

The extent to which consensus or conflict will shape the overriding social order governing relations between ethnic and white groups, can be gauged by the emphasis attributed to this phenomenon, by Broom and Selznick, 1975, as below:-
~~~~~

"The consensus model... gives weight to the persistence of shared ideas... The conflict approach.... holds that society is best understood as the domination of some groups by others. When things look peaceful, it is only because someone is sitting on the lid..." (p.8)

Such considerations aside, any accurate formulation of ethnic consumer behaviour would necessitate looking at the deeper, more metaphysical aspects, as they are reflected in the two rival working models of the mind, for which Akhilananda, ~~~~~  
~~~~~ 1948, in attempting to give an insight into the Eastern mind, remarked with an element of profundity:-

"Contrasts are evident in... the Western, two-storey model, with its weathertight, lightproof shingles,.. and the oriental, three and a half storey, roofless model of the human mind.... which communicates directly with the open sky, and simultaneously invites it down into the poky ground floor living room and the dark, malodorous basement..."

~~~~~

**APPENDICES**  
~~~~~

APPENDIX A
~~~~~

## APPENDIX A ~~~~~

### ETHNIC CONSUMER SURVEY QUESTIONNAIRE ~~~~~

This appendix contains the questionnaire used for the ethnic consumer survey. The questions covered four main aspects relating to ethnic marketing, namely 1) ethnic shopping patterns, 2) media usage, 3) the laundry detergent market and 4) the car market. Appendages to the questionnaire, which follow immediately after, include the semantic differential formats used for the 'self' and 'automobile' image concepts, 'real' and 'ideal' store concepts and, lastly, the ad concepts. Also included are the four test-advertisements used for investigating the differential effectiveness of alternative ad layouts on ethnic and white consumer groups. The appendices are arranged in the following order:-

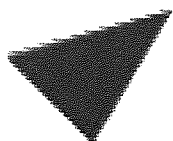
- APPENDIX A: 1      MAP OF SURVEY AREA
- APPENDIX A: 2      ETHNIC CONSUMER SURVEY QUESTIONNAIRE
- APPENDIX A: 3      SEMANTIC DIFFERENTIAL FORMAT FOR THE 'SELF'  
CONCEPT
- APPENDIX A: 4      SEMANTIC DIFFERENTIAL FORMAT FOR THE  
'AUTOMOBILE' CONCEPT
- APPENDIX A: 5      SEMANTIC DIFFERENTIAL FORMAT FOR 'REAL' AND  
'IDEAL' STORES
- APPENDIX A: 6      SEMANTIC DIFFERENTIAL FORMAT FOR AD CONCEPTS
- APPENDIX A: 7      EXPERIMENTAL TEST AD LAYOUTS

The advertisements were randomly allocated to respondents in each consumer group, so that each respondent rated only one test-ad.



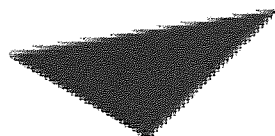
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# APPENDIX A:2 ETHNIC CONSUMER SURVEY QUESTIONNAIRE

SERIAL NUMBER

(1)

ETHNIC CONSUMER SURVEY 1980

MANAGEMENT CENTRE, UNIVERSITY OF ASTON

## SAMPLE DETAILS

WARD

(2)

SAMPLE ADDRESS

(3)

NUMBER OF HOUSEHOLDS  
AT SAMPLE ADDRESS

(4)

(5)

THIS QUESTIONNAIRE IS FOR  
HOUSEHOLD NUMBER

(6)

NAME OF RESPONDENT

## OUTCOME OF INTERVIEW (7)

NON-CONTACT ----- 1

CONTACT ----- 2

IF NON-CONTACT (8)

REASONS FOR NON-CONTACT

Not Available after 3 calls --- 1

Refused ----- 2

IF CONTACT

INTERVIEW  
LENGTH

(9) (10) (11)

Minutes

RECORD OF CALLS MADE

DAY DATE TIME

FIRST CALL

SECOND CALL

THIRD CALL

INTRODUCTION Introduce yourself and explain the purpose of the survey. If necessary give the respondent the covering letter. Stress the importance of the need to get information about the respondent and the respondent's household.

SHOPPING SECTION

I would like to start by asking you about your household shopping.

Q.1 Where does your household do MOST of its shopping for food and groceries?

INTERVIEWER: RECORD ONE PLACE ONLY

PROBE FOR NAME OF SHOPPING CENTRE/AREA. FULL LOCATION DETAILS

code  
(12/13)

Q.2 How do you usually travel to (MAIN SHOPPING CENTRE AT Q.1) to do your food and grocery shopping?

(14)

Walk - less than 5 minutes -----	1
Walk - more than 5 minutes -----	2
Drive car/van -----	3
Passenger in car/van -----	4
Motor cycle -----	5
Bus (Public transport) -----	6
Train -----	7
Bicycle -----	8
Other (Specify) -----	9
Don't know/varies -----	0

(14)

Q.3 About how long does it take you to get there when you go shopping for food and groceries?

(15)

0 -5 minutes -----	1
6 - 10 minutes -----	2
11 - 15 minutes -----	3
16 - 20 minutes -----	4
21 - 30 minutes -----	5
31 - 45 minutes -----	6
46 - 60 minutes -----	7
Over 1 hour -----	8
Don't know/Varies -----	9

(15)

Q.4 Could you tell me which members of the household are usually present when the household does its main shopping for food and groceries?

CODE ONE ONLY

(16)

I go on my own -----	1
With wife/husband -----	2
With wife/husband and child(ren) -----	3
With my child(ren) only -----	4
With adult relatives -----	5
With friend(s) or neighbour(s) -----	6
Other -----	7

(16)



Q.5 SHOW CARD I would like you to tell me, using this card, how much of your weekly food and grocery shopping you do at...  
(NAME OF CENTRE/PLACE GIVEN AT Q.1)

(17)

I do all my food and grocery shopping there ----- 1  
I do over 3/4 of my food and grocery shopping there ----- 2  
I do between 1/2 and 3/4 of my food and grocery shopping  
there --- 3  
I do between 1/4 and 1/2 of my food and grocery shopping  
there --- 4  
I do less than a 1/4 of my food and grocery shopping there 5  
Don't know ----- 6

5b. FOOD PRODUCTS - - - -

(17)

Q.6 How often do you go shopping there for food and groceries?

Everyday ----- 1  
4 - 5 times a week ----- 2  
2 - 3 times a week ----- 3  
Once a week ----- 4  
Once every two weeks ----- 5  
Less often ----- 6  
Don't know ----- 7

(12)

Q.7 Why do you do most of your shopping for food and groceries at..... (NAME OF CENTRE/PLACE GIVEN AT Q.1)? PROBE: Anything else?

(19) (20) (21)

1st 2nd 3rd

Mention Mention Mention

(1 Near to home ----- 1 ----- 1 ----- 1  
(2 Near to work/On way to work-- 2 ----- 2 ----- 2  
(3 Easy to get to by public  
(4 transport- 3----- 3 --- 3  
(4 Parking facilities available 4 ----- 4 ---- 4  
(5 Cheap to travel there ----- 5 ----- 5 ---- 5  
(6 Too expensive to travel  
elsewhere-- 6 ----- 6 ---- 6

(7 Has all the food and groceries  
I want ----- 7 ----- 7 ---- 7

(8 My favorite supermarket is  
there ---- 8 ----- 8 ---- 8

(9 All the shops I need are there 9 ----- 9 ---- 9

(10 Has good supermarkets ----- 0 ----- 0 ---- 0  
(22) (23) (24)

(11 Has a good street market----- 1 ----- 1 ---- 1

(12 I enjoy shopping there ----- 2 ----- 2 ---- 2

(13 I shop there out of habit --- 3 ----- 3 ---- 3

(14 Area has a good name ----- 4 ----- 4 ---- 4

(15 Food and groceries are  
cheaper there ----- 5 ----- 5 ---- 5

(16 Other reasons (specify) ----- 6 ----- 6 ---- 6

(17 Don't know ----- 7

(19/24)

Q.8 Now I would like to know what types of shop are available at .... (NAME OF CENTRE AT Q.1) and which you use.  
ASK FOR EACH TYPE OF SHOP

- a. "Is a ..... available there?  
b. IF YES "Do you use this type of shop these days?"

		(a)		(b)	
		Not Available or Don't Know	Available	Use	Do Not Use
1	Supermarket -----	1 -----	2 -----	3 ---	4
2	Department or variety store-	1 -----	2 -----	3 ---	4
3	Hypermarket or superstore --	1 -----	2 -----	3 ---	4
4	Discount food store -----	1 -----	2 -----	3 ---	4
5	Self service store (not supermarket)-----	1 -----	2 -----	3 ---	4
6	Street market or covered mar ket ----	1 -----	2 -----	3 ---	4
7	Freezer shop -----	1 -----	2 -----	3 ---	4

Smaller shops such as

8	Butcher/Greengrocer/Baker/ Fishmonger ---	1 -----	2 -----	3 ---	4
9	General small grocery store-	1 -----	2 -----	3 ---	4

(25/  
33)

- Q.9 Taking everything into consideration, would you say you are satisfied or dissatisfied with the shopping facilities for food and groceries available at ... (NAME OF CENTRE FROM Q.1)

Very satisfied -----	1
Fairly satisfied -----	2
Fairly dissatisfied -----	3
Very dissatisfied -----	4
Don't know -----	5

(34)

- Q.10 Is there anywhere else where you regularly shop (at least once a month) for food and groceries?

Yes -----	1	<u>ASK Q.11a</u>
No -----	2	<u>GO TO Q.12</u>

(35)

- Q.11a Where else do you regularly shop for food and groceries?  
RECORD BELOW

- b How do you usually travel to this place? RECORD ONLY ONE MEANS - THE ONE THAT IS USED FOR THE GREATEST DISTANCE

WRITE IN FULL DETAILS  
Name of shopping centre,  
Precinct, Area etc.

Walk Walk Drive Passenger  
less over car/ car/van  
5 mins 5 mins van

1-----2-----3-----4

Motorcycle Bus Train Bicycle

5 ----- 6---7-----8

(36)

- Q. 1 Next, I want you to go through this booklet of NEWSPAPER PUBLICATIONS with me and tell me for each paper, roughly how many issues you have read or looked at recently - it doesn't matter where.

EXPLAIN - 'Read or looked at', 'it doesn't matter where'.  
RECORD BELOW

I would now like you to say, for each publication that you have read or looked at, when you last read or looked at a copy. ASK FOR EACH PUBLICATION CODED OTHER THAN NONE When was the last time you read or looked at a copy of ---?  
IF TODAY ASK When did you last look at a copy of --- apart from today?

FOR EACH PUBLICATION CODED 'YESTERDAY' ASK Was yesterday the first day you read or looked at the issue of ---?

DAILY NEWSPAPERS (BOOKLET ONE)

PUBLICATION	(1) NUMBER OF ISSUES READ OR LOOKED AT								(2) LAST SEEN		
	6	5	4	3	2	1	X	0	Yest.	Within last 7 days	Over 7 days
Daily Express	6	5	4	3	2	1	X	0	9	7	3
Daily Mirror	6	5	4	3	2	1	X	0	9	7	3
Daily Mail	6	5	4	3	2	1	X	0	9	7	3
The Times	6	5	4	3	2	1	X	0	9	7	3
The Daily Telegraph	6	5	4	3	2	1	X	0	9	7	3
The Guardian	6	5	4	3	2	1	X	0	9	7	3
The Financial Times	6	5	4	3	2	1	X	0	9	7	3
The Sun	6	5	4	3	2	1	X	0	9	7	3
Birmingham Evening Mail	6	5	4	3	2	1	X	0	9	7	3

(1/2)

RECORD ETHNIC DAILIES BELOW

Daily Jang	6	5	4	3	2	1	X	0	9	7	3
DAILY MIRROR	6	5	4	3	2	1	X	0	9	7	3
GRAND GUARDIAN	6	5	4	3	2	1	X	0	9	7	3
LES PAROLES	6	5	4	3	2	1	X	0	9	7	3
REPUBLICAN TIMES	6	5	4	3	2	1	X	0	9	7	3

ARABAR-E-WATON

(3/4)

COLOUR SUPPLEMENTS AND SUNDAY NEWSPAPERS (BOOKLET TWO)

PUBLICATION	NUMBER OF ISSUES READ OR LOOKED AT								LAST SEEN		
	4	3	2	1	X	0			Yest.	Within last 7 days	Over 7 days
Observer Colour Magazine	4	3	2	1	X	0			9	7	3
Sunday Times magazine	4	3	2	1	X	0			9	7	3

PUBLICATION	(5)						(6)		
	NUMBER OF ISSUES READ OR LOOKED AT						LAST SEEN		
<u>SUNDAY NEWSPAPERS</u>							Yest	Within last 7 days	Over 7 days ago
Sunday Telegraph	4	3	2	1	X	0	9	7	8
News of the World	4	3	2	1	X	0	9	7	8
The Sunday Times	4	3	2	1	X	0	9	7	8
The Observer	4	3	2	1	X	0	9	7	8
Sunday Express	4	3	2	1	X	0	9	7	8
Sunday Mirror	4	3	2	1	X	0	9	7	8

(5/6)

- Q.2 I want you to go through this booklet of WEEKLY MAGAZINES with me and tell me roughly how many issues you have read or looked at recently - it doesn't matter where.  
EXPLAIN 'read or looked at', 'it doesn't matter where'.  
RECORD BELOW  
ASK FOR EACH PUBLICATION CODED OTHER THAN NONE I would now like to ask you, for each publication that you read or looked at, when you last read or looked at a copy, yesterday, within the last 7 days(not yest) or longer ago (over 7 days ago).

When was the last time you read or looked at a copy of---?

PUBLICATION	(1)						(2)			(9)	
	NUMBER OF ISSUES READ OR LOOKED AT						LAST SEEN			YEST FIRST DAY	
							Yest	Within last 7 days	Over 7 days	Yes	No
<u>GENERAL WEEKLY MAGAZINES</u> (BOOKLET THREE)											
TV Times	4	3	2	1	X	0	9	7	8		
Radio Times											
The Economist	4	3	2	1	X	0	9	7	8		
The Scientist	4	3	2	1	X	0	9	7	8		
<u>WOMEN'S WEEKLY MAGAZINES</u> (BOOKLET FOUR)											
Woman's Realm	4	3	2	1	X	0	9	7	8		
Woman	4	3	2	1	X	0	9	7	8		
Woman's Weekly	4	3	2	1	X	0	9	7	8		
Woman's Own	4	3	2	1	X	0	9	7	8		
<u>ETHNIC WEEKLY MAGAZINES</u> (BOOKLET FIVE)											
MASHRIK	4	3	2	1	X	0	9	7	8		

(7/9)

PUBLICATION	NUMBER OF ISSUES READ OR LOOKED AT	LAST SEEN YESTERDAY		
		IST DAY		
		Within 4 Weeks	Over 4 weeks	Yes No

Women's Monthly Magazines (BOOKLET 6)	6 5 4 3 2 1 X 0	9	8	7
---------------------------------------------	-----------------	---	---	---

Vogue	6 5 4 3 2 1 X 0	9	7	8
Good Housekeeping	6 5 4 3 2 1 X 0	9	7	8

Cosmopolitan	6 5 4 3 2 1 X 0	9	7	8
Woman & Home	6 5 4 3 2 1 X 0	9	7	8

Woman's Journal	6 5 4 3 2 1 X 0	9	7	8
Woman's World	6 5 4 3 2 1 X 0	9	7	8

Harpers & Queen	6 5 4 3 2 1 X 0	9	7	8
Womancraft with Sewing & Knitting	6 5 4 3 2 1 X 0	9	7	8

#### GENERAL MONTHLY MAGAZINES

Reader's Digest	6 5 4 3 2 1 X 0	9	7	8
-----------------	-----------------	---	---	---

Ethnic Monthly Magazines	6 5 4 3 2 1 X 0	9	7	8
-----------------------------	-----------------	---	---	---

(10/12)

Q.3 What brands of washing powder have you seen or heard advertised at any time?

	1st Mention	2nd Mention	3rd Mention
Persil-----	1	2	3
Surf -----	1	2	3
Drive -----	3	3	3
Radiant -----	4	4	4
Ariel -----	5	5	5
Daz -----	6	6	6
Bold -----	7	7	7
Fairy -----	8	8	8
Tide -----	9	9	9

(13)

Q.4 Now I would like you to describe the advertisement.

Q.5 What makes of car have you seen or heard advertised?

Q.6 Now I would like you to describe the advertisement.

(14/16)

Q.7 Have you listened to the RADIO at all in the last week?  
 It need not have been at home - it could have been at work,  
 in a car, in somebody else's home or outside.  
 Yes ----- 1  
 No ----- 2

- A IF YES SHOW RADIO CARD  
 Which of the stations on this card have you listened to in  
 the last week? CODE BELOW  
 Any others?  
 b FOR EACH STATION CLAIMED ASK  
 In an average week on how many days out of seven do you listen  
 to ....? CODE BELOW  
 c On an average day when you listen, for how many hours do you  
 listen to .....? CODE BELOW

	(17) RADIO 1	(18) RADIO 2	(19) RADIO 3	(20) RADIO 4	(21) BRMB
Number of Days	7	7	7	7	7
per week	6	6	6	6	6
listened to	5	5	5	5	5
	4	4	4	4	4
	3	3	3	3	3
	2	2	2	2	2
	1	1	1	1	1
less than 1	X	X	X	X	X

(17/21)

#### Hours per Day

Less than 1/2 hr.	1	1	1	1	1
1/2 hr - less than 1 hour	2	2	2	2	2
1 hour - less than 1 1/2 hour	3	3	3	3	3
1 1/2 hour to less than two	4	4	4	4	4
2 hrs - less than 3	5	5	5	5	5
3 hrs - less than 4	6	6	6	6	6
4 hrs - less than 6	7	7	7	7	7
6 hrs or more	8	8	8	8	8

(22/26)

Q.8 Is there a TV in this home?  
 Yes ----- 1 ASK Q.  
 No ----- 2

How often do you watch television these days - would it be  
 nearer to 5 or more days, 3-4 days a week, 1-2 days a week or  
 less often?

5 or more days	1
3 or 4 days	2
1 or 2 days	3
less often	4
Never watch TV	5

(27/28)

Q.9 On a day when you watch, for about how many hours do you  
 view television?

1 hour or less	-----	1
Over 1 up to 2	-----	2
Over 2 up to 3	-----	3
over 3 up to 4	-----	4
over 4 up to 5	-----	5
Over 5 up to 6	-----	6
Over 6 up to 7	-----	7
Over 7 up to 8	-----	8
Over 8 up to 9	-----	9
Over 9 hours	-----	0

(29)

Q.10 About how many hours out of every ten that you watch television would you say you watch ITV?

1 hour or less	-----	1
Over 1 up to 2	-----	2
Over 2 up to 3	-----	3
over 3 up to 4	-----	4
Over 4 up to 5	-----	5
Over 5 up to 6	-----	6
Over 6 up to 7	-----	7
Over 7 up to 8	-----	8
Over 8 up to 9	-----	9
Over 9 hours	-----	0

(30)

Q.11 How frequently do you watch the following programs on television?

	Everyday	Quite often	Occasionally	Infreq.	Never
National & Local news	-----1	-----2	-----3	-----4	-----5
Sports	-----1	-----2	-----3	-----4	-----5
Movies	-----1	-----2	-----3	-----4	-----5
Variety shows	-----1	-----2	-----3	-----4	-----5
Cartoons	-----1	-----2	-----3	-----4	-----5
Police,adventure shows	-----1	-----2	-----3	-----4	-----5

(31/36)

Q.12 How often these days do you go to the CINEMA - would it be nearer to once a week or more often, two or three times a month once a month, once every two or three months, two or three times a year, less often, or do you never go these days?

Once a week or more often	-----	1
Two or three times a week	-----	2
Once a month	-----	3
Once every two or three months	-----	4
Two or three times a year	-----	5
Less often	-----	6
Never go these days	-----	7

(37)

ASK ALL How long ago was the last accasion that you went to a cinema?

Within last 7 days	-----	1
Over 7 days up to and including 4 weeks ago	-----	2
Over 4 weeks up to and including 3 months ago	---	3
Over 3 months up to and including 6 months ago	--	4
Over 6 months ago	-----	5

(38)

Q.13 IF IN LAST FOUR WEEKS How many times have you been to the cinema in the last 4 weeks? -----

LAUNDRY DETERGENT SECTION  
(WASHING POWDERS)

ASK ALL

I would now like to ask you about the purchase and use of laundry detergents. Please answer all the questions that apply to you (or your family).

Q.1 Considering washing powders, please tell me all the brands you can think of. DO NOT PROMPT

(1)

Persil	-----	1
Persil Automatic	-----	2
Surf	-----	3
Drive	-----	4
Radiant	-----	5
Ariel	-----	6
Daz	-----	7
Bold	-----	8
Fairy	-----	9
Tide	-----	0

(1)

Q.2 Now I would like you to tell me which statement best describes your interest in purchasing the following brands of washing powder. SHOW CARD

	<u>PERSIL</u>	<u>PERSIL AUTOMATIC</u>	<u>SURF</u>	<u>DRIVE</u>	<u>RADIANT</u>	<u>ARIEL</u>	<u>DAZ</u>	<u>BOLD</u>	<u>FAIRY</u>	<u>TIDE</u>
Always buy	1--	1--	1--	1--	1--	1--	1--	1--	1--	1
Frequently buy	2--	2--	2--	2--	2--	2--	2--	2--	2--	2
Occasionally buy	3--	3--	3--	3--	3--	3--	3--	3--	3--	3
Not know whether I would buy	4--	4--	4--	4--	4--	4--	4--	4--	4--	4
Only rarely buy	5--	5--	5--	5--	5--	5--	5--	5--	5--	5
Be unlikely to buy	6--	6--	6--	6--	6--	6--	6--	6--	6--	6
Never buy	7--	7--	7--	7--	7--	7--	7--	7--	7--	7

(2)

Q.3 Thinking of the brands of laundry detergents you are aware of, if you should decide to buy a pack of washing powder now, what brand would you prefer most?

Prefer PERSIL ----- 1  
Prefer other brands ----- 2  
No preference ----- 3

(3)

Q.4 Thinking back to when you had first decided to buy a pack of washing powder did you have a definite idea which brand you wanted to buy or did you think of a few brands, or did you have a rather open mind about brands?

Considered only one brand from outset ----- 1  
Bought a different brand than had before ----- 2  
Had not used the item before ----- 3

(4)



Q.5 In your last purchase of washing powder, did you consider and buy the old brand, bought a different brand than you had before, or had not used the item before?

Considered and bought the old brand ----- 1  
 Bought a different brand than had before --- 2  
 Had not used the item before ----- 3

(5)

Q.6 Do you do your own laundry?

Yes ----- 1  
 No ----- 2

(6)

Q.7 How frequently do you use washing powder?

2-3 times a week ----- 1  
 Once a week ----- 2  
 Once in two weeks ----- 3

(7)

WHICH PACK SIZE DO YOU GENERALLY PURCHASE?

Q.8 How frequently do you purchase a pack of washing powder?

Never ----- 1  
 Once or twice a year ----- 2  
 About once every three months-- 3  
 About once a month ----- 4  
 More often than once a month -- 5

(8)

88. HOW MANY PACKS OF WASHING POWDER DO YOU PURCHASE IN A MONTH?

Q.9 I would like you to indicate how you would normally purchase a pack of washing powder.

Buy it alone ----- 1  
 Buy with friends ----- 2  
 Buy with parents, brother  
 or sister- 3  
 Ask someone in the family  
 to buy --4

(10)

98. PRICE RECALL -----

Q.10 What product qualities or characteristics would you look for when buying laundry detergent?

PROMPT Anything else?

1st 2nd 3rd  
Mention Mention Mention

WHITENING ABILITY ----- 1 ----- 2 ----- 3

SUDSINESS ----- 1 ----- 2 ----- 3

MILDNESS TO CLOTHES ----- 1 ----- 2 ----- 3

MILDNESS TO SKIN  
 CLEANING ABILITY

(10/  
 12)

Q.11 Now I am going to read out some statements that describe how people may feel about their choice of laundry detergent.

As I read out each statement I want you to indicate how important each of these dimensions is to your choice of detergent.  
 SHOW CARDS

How important would each of these attributes be in your ideal choice of detergent?

		Extremely Important	Important	No Opinion	Unimportant	Extremely Unimportant
1)	Price	-----1	-----2	-----3	-----4	-----5
2)	Cleaning Ability	----1	-----2	-----3	-----4	-----5
3)	Quantity required per wash load	---1	-----2	-----3	-----4	-----5
4)	Softness to clothes	---1	-----2	-----3	-----4	-----5
5)	Softness to skin	---1	-----2	-----3	-----4	-----5
6)	Relative whitening ability	---1	-----2	-----3	-----4	-----5
7)	Stain-removing power of detergent	-----1	-----2	-----3	-----4	-----5
8)	Sudsiness	-----1	-----2	-----3	-----4	-----5
9)	Brand name	-----1	-----2	-----3	-----4	-----5
10)	Package size	-----1	-----2	-----3	-----4	-----5
11)	Recommendation by friends	-----1	-----2	-----3	-----4	-----5

(13/24)

Q. 12 In deciding your purchase did you feel you knew a lot or something about the item, did you rely on others for information and advice or both?

Felt you knew a lot about the item ----- 1

Relied on others for information and advice --- 2

Both ----- 3

(25)

Q. 13 When you went to a store for the first time, did you feel that you were ready to purchase on the basis of information which you already had?

Were ready to buy ----- 1

Were not ready to buy ----- 2

(26)

Q. 14 Considering your last purchase of washing powder... ASK

a How satisfied were you with your decision?

VERY DISSatisfied \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:VERY DISSATISFIED

b How certain are you that you made the best decision?

VERY UNCERTAIN \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:VERY CERTAIN

(27)

(28)

c How confused did you feel in making your choice?

VERY CONFUSED \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:NOT AT ALL CONFUSED

(29)

d How likely is it that you did not get the best buy for your money?

VERY UNLIKELY \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:VERY LIKELY

(30)

E. How likely is it that one of the other brands you did not choose would be equal to or better than your choice in satisfying your expectations?

VERY  
LIKELY \_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_: UNLIKELY

(31)

f. If a new brand were to be introduced on the market, how much would you like to receive information about it?

VERY  
INTERESTED \_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_: NOT AT ALL  
INTERESTED

(32)

g. How sure are you that a new detergent in the same price class which previously has not been on the market, would be as good as the one you chose?

VERY  
SURE \_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_: VERY  
UNSURE

(33)

Q.15 How important is your purchase of detergent to its effect on how others view you?

VERY  
IMPORTANT \_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_: NOT AT ALL  
IMPORTANT

Q.16 How important is your choice of detergent to you?  
Why? RECORD BELOW

VERY  
IMPORTANT \_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_:\_\_\_: NOT AT ALL  
IMPORTANT

Dissatisfaction of others ----- 1  
family members  
What friends think ----- 2  
Money loss ----- 3  
Personal regret ----- 4

(34/36)

Q.17 From which sources do you remember obtaining helpful information in your choice of detergent?

(37) (38) (39)  
1st 2nd 3rd  
Mention Mention Mention

----- 1 ----- 2 ----- 3

----- 1 ----- 2 ----- 3

----- 1 ----- 2 ----- 3

(37/39)

Q. 18 Which source of information do you rely on MOST for information about detergents?

TV Commercials ----- 1  
Friends or neighbours --- 2  
Family or relatives ----- 3  
Newspaper or magazine advertisements ---- 4  
Store employee ----- 5

Q.18 Now I am going to read out some statements that describe the kinds of information people like to have before buying a new brand of laundry detergent. For each kind of information please indicate whether you would like to have that information in a choice of washing powder.

Store shelf ----- 1  
 Store Window display ----- 2  
 Store banner ----- 3  
 Store Employee ----- 4  
 Customer in store ----- 5

Family member who lives here -- 6  
 Relative who doesn't live here - 7  
 Neighbours ----- 8  
 Friends ----- 9  
 Fellow employee ----- 10

Previous experience with product 1

Consumer Report ----- 2  
 Magazine advertising ----- 3  
 Newspaper advertising ----- 4  
 Television advertising ----- 5  
 Radio advertising ----- 6  
 Magazine and newspaper articles -7  
 Telephone calls to stores ----- 8

(41)

Q.19 I would like you to indicate the persons with whom you  
 a. usually shop?

b. Like to discuss shopping? (42) (43)

	SHOP WITH	LIKE TO DISCUSS WITH
Friends -----	1 -----	1 -----
Husband -----	2 -----	2 -----
Mother -----	3 -----	3 -----
Children -----	4 -----	4 -----
Other family members -----	5 -----	5 -----
No one in particular -----	6 -----	6 -----
Never shops with others --	7 -----	7 -----

(42/43)

Q.20 Which type of store did you last purchase washing powder?

RECORD BELOW

Can I just check, is this where you regularly purchase laundry detergent? RECORD BELOW

Is this where you regularly purchase food and groceries?

(44) (45) (46)

	LAST PURCHASE OF DETERGENT	REGULAR SHOPPING FOR DETERGENT	REGULAR FOOD/GROCERY SHOPPING
--	-------------------------------	-----------------------------------	-------------------------------------

Super Market -----	1 -----	2 -----	3 -----
Variety or			
Dept store -----	1 -----	2 -----	3 -----
Superstore -----	1 -----	2 -----	3 -----
Discount food store -	1 -----	2 -----	3 -----
Self service store --	1 -----	2 -----	3 -----
General small grocery	1 -----	2 -----	3 -----
store in neighbourhood			

(44/46)

Q.21 Considering your last purchase of laundry detergent, how many stores did you visit before making the purchase?

Shopped only in the store where the purchase was made ----- 1  
Shopped in the store of purchase and one or two additional stores ----- 2

(41)

Q.22 How many times did you visit the store where the purchase was made?

Only once ----- 1  
Made two visits ----- 2  
Made three or more trips- 3

(42)

Q.23. Now I am going to give you a card with some statements. On each of the scales please check the space which you feel best describes the store where you frequently purchase laundry detergent.

Next, I am going to give you another identical card. On this card I would like you to indicate the space which best describes the ideal store where you would like to make your purchase.

(49)

Q.24 When you decide to purchase washing powder, do you look for convenience of use or for good value or both?

Convenience ----- 1 ASK 25b  
Good value ----- 2  
Both ----- 3 ASK 25a

Q.25a Which aspect is more important?

Convenience ----- 1  
Good value ----- 2

b. What determines convenience?

(50/53)

Q.26. What is the most you would think of spending on a pack of washing powder? For which pack size? RECORD BELOW

PRICE IN PENCE  
PACK SIZE

(54)

Q.27 What is the lowest price at which you would still buy - the price below which you would not trust the quality?

PRICE IN PENCE  
PACK SIZE

(55)

Q.28 How difficult do you find it to judge the quality of the brand, given price information?

VERY DIFFICULT : : : : : VERY EASY

Q.29 How undesirable are the consequences of making a poor brand choice?

VERY  
UNDESIRABLE \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:VERY  
DESIRABLE

Q.30 How sure are you of your ability to judge the quality of laundry detergent?

VERY UNSURE \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:VERY SURE

Q.31 How much variation in quality do you consider there exists among brands?

A SIGNIFICANT  
AMOUNT \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:VERY LITTLE  
VARIATION

(54/52)

Q.32 Now I am giving you a card with methods which people find useful in certain situations in their choice of product. For each situation please indicate how helpful you would find each method.

Sometimes when we buy a product that turns out defective we feel foolish; how helpful would you find each of the methods in this case?

	VERY HELPFUL	VERY UNHELPFUL
Endorsement	____:____:____:____:____:	
BRAND Image	____:____:____:____:____:	
Brand loyalty	____:____:____:____:____:	
Private testing	____:____:____:____:____:	
Store Image	____:____:____:____:____:	
Free sample	____:____:____:____:____:	
Money back guarantee	____:____:____:____:____:	
Govt testing	____:____:____:____:____:	
Shopping	____:____:____:____:____:	
Expensive brand	____:____:____:____:____:	
Word of mouth	____:____:____:____:____:	

(59)

When some products fail we suffer a loss in the money spent on the purchase. How helpful would you find each of the methods in reducing this loss?

Endorsement	____:____:____:____:____:
Brand image	____:____:____:____:____:
Brand loyalty	____:____:____:____:____:

Private testing	___	___	___	___	___
Store Image	___	___	___	___	___
Free sample	___	___	___	___	___
Money back guarantee	___	___	___	___	___
Govt testing	___	___	___	___	___
Shopping	___	___	___	___	___
Expensive brand	___	___	___	___	___
Word of mouth	___	___	___	___	___

(60)

How helpful would you find each of these methods in avoiding a loss of time spent in purchase of detergent?

	VERY HELPFUL	VERY UNHELPFUL
Endorsement	___	___
Brand image	___	___
Brand loyalty	___	___
Private testing	___	___
Store image	___	___
Free sample	___	___
Money back guarantee	___	___
Govt testing	___	___
Expensive brand	___	___
Word of mouth	___	___

(61)

Some products are dangerous to our health and safety if they fail. How helpful would you find each of these methods in the case of a detergent?

	VERY HELPFUL	VERY UNHELPFUL
Endorsement	___	___
Brand image	___	___
Brand loyalty	___	___
Private testing	___	___
Store image	___	___
Free sample	___	___
Money back guarantee	___	___
Govt testing	___	___
Expensive brand	___	___
Word of mouth	___	___

(62)

Q. 33 What is the likelihood of your buying a pack of washing powder sometime during the next month?

DEFINITELY	DEFINITELY
WON'T BUY	WILL BUY

(63)

Q. 34 If you do buy a laundry detergent sometime during the next month, what is the likelihood that you will purchase PERSIL instead of some alternative brand?

DEFINITELY WILL	DEFINITELY WILL
BUY SOME	BUY TEST BRAND
ALTERNATIVE	

(64)

Q. 35 During the next month, in terms of affordability and accessibility of retail outlets how difficult will it be for you to purchase a pack of PERSIL?

VERY DIFFICULT	VERY EASY FOR
FOR YOU TO	YOU TO PURCHASE
PURCHASE	

(65)

Q.36 Assume that you purchase a pack of washing powder during the next month. Then, ignoring the affordability and accessibility how does PERSIL washing powder compare with other brands in meeting your requirements?

LEAST ABLE TO  
SATISFY YOUR  
REQUIREMENTS

\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:

BEST ABLE TO  
SATISFY YOUR  
REQUIREMENTS

(66)

Q.37 Now, considering the previous purchases of washing powder in your household, who usually recognizes the need to purchase?

Husband ----- 1  
Wife ----- 2  
Husband or wife ----- 3  
Child/children ----- 4  
Wife and child ----- 5  
Husband and child ----- 6  
Husband, wife and child -- 7

(67)

Q.38 Who is most influential in the brand decision for your choice of washing powder?

Husband ----- 1  
Wife ----- 2  
Husband and wife ----- 3  
Child/children ----- 4  
Wife and child ----- 5  
Husband and child ----- 6  
Husband, wife and child--- 7

(68)

Q.39 I would like you to indicate how you would tell which laundry detergent is the best buy for you. You may give more than one answer.

One that is on sale ----- 1  
One that is advertised a lot -- 2  
One that my friends like ----- 3  
One with a well-known brand name-- 4  
One that my parents like ----- 5  
One sold by a well-known store --- 6

(69)



# CAR PURCHASE DECISION

ASK ALL

Q.1 Does your household own a car?

IF YES How many? GO TO Q.3

0 1 2 3 4

IF NO CODE 0 ASK Q.2

(1)

Q.2 Have you/or your household owned a car previously?

Yes ----- 1

No ----- 2 GO TO Q.4

(2)

Q.3 What make and model is the car you purchased most recently?

<u>MAKE</u>	<u>MODEL</u>		
Leyland	Mini	-----	1
	Marina	-----	2
	Allegro	-----	3
		-----	4
Ford	Escort	-----	1
	Cortina	-----	2
	Fiesta	-----	3
		-----	4
Chrysler	Avenger	-----	1
		-----	2
Vauxhall	Chevette	-----	1
		-----	2
Renault	12	-----	1
		-----	2
Datsun	Sunny	-----	1
		-----	2
Volvo	245	-----	1
		-----	2
Fiat	127	-----	1
		-----	2
Volkswagen	Polo	-----	1

(3)

(4)

(5/11)

Q.4 Does your household own the following items?

	<u>Yes</u>	<u>No</u>
Washing machine -----	1	0
TV Set -----	1	0
Fridge -----	1	0

(12)

Q.5 Now I would like to know some details about the way in which the car purchase was decided.

I would like you to indicate how involved the following members were were in the initial suggestion to purchase a car.

	<u>VERY INVOLVED</u>	<u>MODERATELY INVOLVED</u>	<u>NOT INVOLVED</u>
Husband -----	1	1	1
Wife -----	1	2	3
Child/children -----	1	2	3

(13/15)

Q.5 Who was primarily responsible for the decision to purchase the car?

Husband -----	1
Wife -----	2
Husband and wife -----	3
Child/children -----	4
Husband and child(ren) -----	5
Wife and child(ren) -----	6
Husband, wife and child(ren) -----	7

(16)

Q.6 I would like you to indicate, for the last car purchased, how involved the following members were in the final decision about \_\_\_\_

Which model of car to buy?

	VERY INVOLVED	MODERATELY INVOLVED	NOT INVOLVED
Husband -----	1	2	3
Wife -----	1	2	3
Child(ren) -----	1	2	3

(17/19)

What colour car to purchase?

	VERY INVOLVED	MODERATELY INVOLVED	NOT INVOLVED
Husband -----	1	2	3
Wife -----	1	2	3
Child(ren) -----	1	2	3

(21/23)

What make of car to buy?

	VERY INVOLVED	MODERATELY INVOLVED	NOT INVOLVED
Husband -----	1	2	3
Wife -----	1	2	3
Child(ren) -----	1	2	3

(24/26)

When the car would be purchased?

	VERY INVOLVED	MODERATELY INVOLVED	NOT INVOLVED
Husband -----	1	2	3
Wife -----	1	2	3
Child(ren) -----	1	2	3

(27/29)

How much money to spend on the purchase?

	VERY INVOLVED	MODERATELY INVOLVED	NOT INVOLVED
Husband -----	1	2	3
Wife -----	1	2	3
Child(ren) -----	1	2	3

(30/32)

The type of financing?

	VERY INVOLVED	MODERATELY INVOLVED	NOT INVOLVED
Husband -----	1	2	3
Wife -----	1	2	3
Child(ren) -----	1	2	3

(33/35)

Where to purchase the car?

	VERY INVOLVED	MODERATELY INVOLVED	NOT INVOLVED
Husband -----	1	2	3
Wife -----	1	2	3
Child(ren) -----	1	2	3

(36/38)

Q.7 How well was your previous car performing?

Product broken down ----- 1  
Product in fair condition ----- 2  
Product in good condition ----- 3  
No previous product ----- 4

(39)

Q.8 How many kilometres do you drive per year?

(40)

Q.9 Thinking back to when you had first decided to purchase a car, did you have a definite idea which make you wanted to buy, or did you think of a few makes or were you open minded from the outset?

Initially considered one make ----- 1  
Considered a few makes ----- 2  
Were initially open-minded as to make ----- 3

(41)

Q.10 I would like to know how long ago you had tentatively decided to purchase the car, even though you might not have been sure of such things as model, price and brand.

Bought more than one year ----- 1  
Bought within one year ----- 2  
Bought within 6 months ----- 3  
Bought within less than six months ----- 4

(42)

Q.11 In deciding the car purchase did you feel you knew a lot or something about the item, relied on others for information and advice or both?

Knew a lot or something about the item ----- 1  
Relied on others for information and advice ----- 2  
Both ----- 3

(43)

Q.12 What types of information about the car did you seek in order to decide on your choice of car?

	1st Mention	2nd Mention	3rd Mention
Reliability -----	1	1	1
Performance -----	2	2	2
Price -----	3	3	3
Dealers/Service -----	4	4	4

(44/46)

Q.13 Now I am going to read out some statements that describe how people feel about their choice of car. As I read out each statement I want you to indicate your agreement from this card. HAND INFORMANT CARD

	AGREE STRONGLY	AGREE SLIGHTLY	DISAGREE SLIGHTLY	DISAGREE STRONGLY	NO OPINION
LOW PRICE IS IMPORTANT IN CHOICE OF CAR	1	2	3	4	5

(47)



Q.16 How important is your choice of car to you?  
Why? RECORD BELOW

VERY NOT AT ALL  
IMPORTANT \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:IMPORTANT

Dissatisfaction of others ----- 1  
family members  
What friends think ----- 2  
Money loss ----- 3  
Personal regret ----- 4

(59/60)

Q.17 From which sources do you remember obtaining HELPFUL  
INFORMATION in your choice of car? RECORD BELOW

Which source of information did you RELY ON MOST for information  
regarding car purchase? RECORD BELOW

Now I am going to read out some statements that describe the  
kinds of information people like to have before buying a new  
car. For each kind of information please indicate whether you  
would like to have that information in a choice of car.

	(61)	(62)	(63)
	INFORMATION	RELY ON	MEDIA
	FOUND HELPFUL	MOST	PREFERENCE
Store shelf -----	1	1	1
Store window display -----	2	2	2
Store banner -----	3	3	3
Store employee -----	4	4	4
Customer in store -----	5	5	5
Family member who lives here--	6	6	6
Relative, doesn't live here --	7	7	7
Neighbours -----	8	8	8
Friends -----	9	9	9
Fellow employee -----	0	0	0
Previous experience with cars	1	1	1
Consumer Report -----	2	2	2
Magazine advertising -----	3	3	3
Newspaper advertising -----	4	4	4
Television advertising -----	5	5	5
Radio advertising -----	6	6	6
Magazine and newspaper articles	7	7	7
Telephone calls to stores ----	8	8	8

(61/63)

Q.18 Considering your car purchase, how many stores/dealers did  
you visit, before making the final purchase?

Shopped only in the store where the purchase was made --- 1  
Shopped in the store of purchase and one or two  
additional stores ----- 2

(64)

Q.19 How many times did you visit the store where the purchase  
was made?

Only once ----- 1  
Made two visits ----- 2  
Made three or more trips 3

(65)

Q.20 Now lets consider how much you feel you influence friends and relatives on the following two topics\_\_

- a Household cleansers and detergents
- b. Automobiles

	Household cleansers and detergents	Automobiles
Quite a bit -----	1 -----	1
To some extent -----	2 -----	2
Very little -----	3 -----	3

Q.21 How much do you feel others influence you?

	Household cleansers	Automobiles
Quite a bit----	1 -----	1
To some extent -----	2 -----	2
Very little -----	3 -----	3

(66/69)

Q.22 How much confidence do you usually have in your own ability?

Q.23 How do you evaluate yourself on the following areas, in comparison with most buyers? ASK FOR

- a Household cleansers and detergents
- b Automobiles

(70)

Q.24 How about your interest in each topic or area? ASK FOR

- a Household cleansers and detergents
- b Automobiles

(71/74)

	Household cleansers and detergents	Automobiles
Quite interested -----	1 -----	1
Somewhat interested -----	2 -----	2
Not very interested -----	3 -----	3

(75/76)

Q.25 How often do you try out new ideas or suggestions in each topic or area? ASK FOR

- a Household cleansers and detergents
- b Automobiles

	Household cleansers and detergents	Automobiles
Frequently-----	1 -----	1
Occasionally -----	2 -----	2
Not at all -----	3 -----	3

(77/78)

Q.26 Compared to your circle of friends are you less likely, about as likely or more likely to be asked for advice about the following topics?

- a Household cleansers and detergents
- b Automobiles

	Household cleansers and detergents	Automobiles
Less likely to be asked--	1 -----	1
About as likely to be asked -----	2 -----	2
More likely to be asked -	3 -----	3

79/80

Q.27 When you and your friends discuss new ideas about the following topics what part are you most likely to play?

- a Household cleansers and detergents
- b Automobiles

	Household cleansers	Automobiles
Mainly listen-----	1	1
Try to convince them		
of your ideas -----	2	2

(81/82)

Q.28 How much do you talk with friends and relatives (not the family living in your house) about each topic ? ASK FOR

- a Household cleansers and detergents
- b Automobiles?

	Household & Detergents	Automobiles
Frequently -----	1	1
Occasionally-----	2	2
Not at all -----	3	3

(83/84)

Q.29 How much do you feel you know about the following topics or areas in comparison to your friends and relatives?

	Household & Detergents	Automobiles
More than most -----	1	1
About the same as most---	2	2
Less than most -----	3	3

(85/86)

Q.30 I would like you to indicate the extent of your agreement with the following statements as I read them out.  
SHOW CARD

I often decide to buy those products that my friends have told me about.

Strongly Strongly  
Agree \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: Disagree

I place a lot of confidence in friends' opinions in what I buy.

Strongly Strongly  
Agree \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: Disagree

Many of the items I own are similar to those of my friends

Strongly Strongly  
Disagree\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: Agree

I often decide to buy those items that I see my friends using.

Strongly Strongly  
Agree \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: Disagree

(87/90)

Q.31 Now if you had to make a single statement about yourself covering all the social groups you know, would you say that generally you are a leader in many groups, in some groups or in a few groups?

A leader in many groups ----- 1  
A leader in some groups ----- 2  
A leader in few groups - - - - 3  
In hardly any groups ----- 4

(91)

Q.32 How many separate groups or circles of friends do you personally have?

One ----- 1  
Two ----- 2  
Three or more --- 3

\_\_\_\_\_  
(92)

Q.33 I would like you to indicate how involved the following members were in obtaining and evaluating information relevant to the car purchase.

	VERY INVOLVED	MODERATELY INVOLVED	NOT INVOLVED
Husband -----	1	2	3
Wife -----	1	2	3
Child(ren) -----	1	2	3

\_\_\_\_\_  
(93)

Q.34 Now I am going to give you a card describing how people may think of their cars. On each of the scales please check the space you feel best describes your CURRENT SELF (as you see yourself)

Next I am going to give you another similar card. On this card I want you to check the space which best describes YOUR OWN CAR, as you see it.

\_\_\_\_\_  
(94)

Q.35 Now I would like your opinion about the various makes of cars thinking about them from different points of view. SHOW CARD.

\_\_\_\_\_  
(95)

Q.36 Now I have some incomplete sentences. I will read them to you one at a time and I'd like you to finish them for me with whatever they make you think of.

\_\_\_\_\_  
(96)

Q.37) Now I would like your opinion about the following advertisements as I show them to you. HAND COPY OF AD, THEN TAKE BACK AND HAND DATA COLLECTION SHEET. On each of the scales please check the space which you feel best describes the advertisement you have just read.



ASK ALL- COMPLETE THIS AT THE END OF INTERVIEW

Q.1 Which letter on this card is the group in which you would put your household's total income from all sources before tax and other deductions? SHOW CARD JUST ASK FOR LETTER CODE

	<u>POUNDS PER WEEK</u>	<u>POUNDS PER YEAR</u>	
A	-----Less than £20	-----Less than £1000	----- 1
B	-----£20 - £ 39	-----£1000 - £1999	----- 2
C	-----£40 - £ 49	-----£2000 - £2499	----- 3
D	-----£50 - £ 59	-----£2500 - £2999	----- 4
E	-----£60 - £ 69	-----£3000 - £3499	----- 5
F	-----£70 - £79	-----£3500 - £3999	----- 6
G	-----£80 - £ 89	-----£4000 - £4999	----- 7
H	-----£90 - £ 99	-----£5000 - £7499	----- 8
I	-----£100- £149	-----£7499 or more	----- 9

(1)

Q.2 AGE GROUP OF INFORMANT

15-24 25-34 35-44 45-54 55-64 65 or over  
1 -----2 -----3 -----4 -----5 -----6

(2)

Q.3 SEX OF INFORMANT

Male ----- 1  
Female ----- 2

(3)

Q.4 EMPLOYMENT STATUS OF INFORMANT

Self-employed

25 or more employees ----- 1  
1-24 employees ----- 2  
No employees ----- 3

Employee

Manual ----- 1  
Non-manual ----- 2

(4)

Q.5 Language spoken at home \_\_\_\_\_

Q.6 Place of origin \_\_\_\_\_

(5/6)

APPENDIX A: 3  
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SEMANTIC DIFFERENTIAL FORMAT FOR 'SELF' CONCEPT
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AS I SEE MY CURRENT SELF

SOPHISTICATED \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: UNSOPHISTICATED  
EXCITING \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: DULL  
HUSKY \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: WEAK  
HAPPY \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: SAD  
ECCENTRIC \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: CONVENTIONAL  
BOLD \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: SHY  
YOUNG \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: OLD  
NIMBLE \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: CLUMSY  
SIMPLE \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: COMPLEX  
SPORTY \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: BUSINESSLIKE  
OBVIOUS \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: SUBTLE  
STALE \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: FRESH  
ROBUST \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: FRAGILE  
SWIFT \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: SLOW  
ELEGANT \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: PLAIN  
LIVELY \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: CALM  
INDULGENT \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: THRIFTY  
RELIABLE \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: UNRELIABLE  
SAFE \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: DANGEROUS  
IMPULSIVE \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: DELIBERATE  
MASCULINE \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: FEMININE  
SPACIOUS \_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_:\_\_\_\_: CRAMPED

SEMANTIC DIFFERENTIAL FORMAT FOR 'SELF' CONCEPT

(URDU LINGUISTIC TRANSLATION)

ہم خود کو کیسے نظر آتے ہیں

اجنبی	_____	بے ادبی
دوہنر	_____	دوہنر
مکمل	_____	مکمل
خوش مزاج	_____	اداس
بہت	_____	شرمندہ
عجب	_____	شریف
جوان	_____	پوٹھا
بہوشیار	_____	نامام
الہیاتی	_____	مشکل
بے فکر	_____	فلمی
طاہر	_____	گہرا
پیرا	_____	تانا
طاقتور	_____	کمزور
تیز	_____	ست
شاندار	_____	سادہ
شعبی	_____	خوش
بے فکر	_____	پریشان
بہرہ ور	_____	بے ایمان
لالق	_____	مال لقا
قوی	_____	عقد مار
کھد	_____	جھگڑا
_____	_____	_____

SEMANTIC DIFFERENTIAL FORMAT FOR 'SELF' CONCEPT

(HINDI LINGUISTIC TRANSLATION)

हम खुद को कैसे नज़र आते हैं

अदबी	___	___	___	___	___	___	बेअदबी
शैशान	___	___	___	___	___	___	धुन्धला
ताकतवर	___	___	___	___	___	___	कमजोर
खुश	___	___	___	___	___	___	उदास
अजीब	___	___	___	___	___	___	शरीफ
बहादुर	___	___	___	___	___	___	शर्मिन्दा
जवान	___	___	___	___	___	___	बूढ़ा
तेज़	___	___	___	___	___	___	सुस्त
सादा	___	___	___	___	___	___	मुश्किल
बेफिक्र	___	___	___	___	___	___	फिक्रमन्द
जाहिर	___	___	___	___	___	___	गहिरा
पुराना	___	___	___	___	___	___	ताज़ा
तगड़ा	___	___	___	___	___	___	नाज़ुक
होशियार	___	___	___	___	___	___	नाकाम
शानदार	___	___	___	___	___	___	सादा
शोरमी	___	___	___	___	___	___	खामोश
मस्त	___	___	___	___	___	___	परेशान
भरोसेदार	___	___	___	___	___	___	नाकाम
सावधान	___	___	___	___	___	___	खतरनाक
बेमकसदी	___	___	___	___	___	___	मकसदी
खुला मिज़ाज	___	___	___	___	___	___	तंग मिज़ाज
आदमी जैसे	___	___	___	___	___	___	औरत जैसे

SEMANTIC DIFFERENTIAL FORMAT FOR 'SELF' CONCEPT

(GUJARATI LINGUISTIC TRANSLATION)

હું મને કેમ જોવ છું.

સભ્ય	—	:	—	:	—	:	—	:	—	:	—	:	અસભ્ય
પ્રકાશિત	—	:	—	:	—	:	—	:	—	:	—	:	અંધારું
તાકાતી	—	:	—	:	—	:	—	:	—	:	—	:	કમજબ
ખુશ	—	:	—	:	—	:	—	:	—	:	—	:	દુઃખી
ઉત્તાવળ	—	:	—	:	—	:	—	:	—	:	—	:	રિવાજી
ચાલક	—	:	—	:	—	:	—	:	—	:	—	:	શરમ ખોર
જવાન	—	:	—	:	—	:	—	:	—	:	—	:	ધરતું
મુકપથી	—	:	—	:	—	:	—	:	—	:	—	:	આળસુ
સાદા	—	:	—	:	—	:	—	:	—	:	—	:	અધરું
સહેલું	—	:	—	:	—	:	—	:	—	:	—	:	આજ્ઞાકારી
ઉધારું	—	:	—	:	—	:	—	:	—	:	—	:	સખત
નવું	—	:	—	:	—	:	—	:	—	:	—	:	જુનું
તગળા	—	:	—	:	—	:	—	:	—	:	—	:	કમજોર
હોશિયાર	—	:	—	:	—	:	—	:	—	:	—	:	ભોદા
દે આવળી	—	:	—	:	—	:	—	:	—	:	—	:	સરલ
શોખી	—	:	—	:	—	:	—	:	—	:	—	:	શાંત
વાજબી	—	:	—	:	—	:	—	:	—	:	—	:	નાકામ
મહેવાણું	—	:	—	:	—	:	—	:	—	:	—	:	સખત
ભરોસેદાર	—	:	—	:	—	:	—	:	—	:	—	:	અતરનાક
ઉત્સાહી	—	:	—	:	—	:	—	:	—	:	—	:	ગાફાકાર
ખુલા	—	:	—	:	—	:	—	:	—	:	—	:	તંગ
	—	:	—	:	—	:	—	:	—	:	—	:	

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SOPHISTICATED : : : : : : : UNSOPHISTICATED
EXCITING : : : : : : : DULL
HUSKY : : : : : : : WEAK
HAPPY : : : : : : : SAD
ECCENTRIC : : : : : : : CONVENTIONAL
BOLD : : : : : : : SHY
YOUNG : : : : : : : OLD
NIMBLE : : : : : : : CLUMSY
SIMPLE : : : : : : : COMPLEX
SPORTY : : : : : : : BUSINESSLIKE
OBVIOUS : : : : : : : SUBTLE
STALE : : : : : : : FRESH
ROBUST : : : : : : : FRAGILE
SWIFT : : : : : : : SLOW
ELEGANT : : : : : : : PLAIN
LIVELY : : : : : : : CALM
INDULGENT : : : : : : : THRIFTY
RELIABLE : : : : : : : UNRELIABLE
SAFE : : : : : : : DANGEROUS
IMPULSIVE : : : : : : : DELIBERATE
MASCULINE : : : : : : : FEMININE
SPACIOUS : : : : : : : CRAMPED

SEMANTIC DIFFERENTIAL FORMAT FOR 'AUTOMOBILE' CONCEPT

(URDU LINGUISTIC TRANSLATION)

| | |
|----------------------------|-------|
| ہماری گاڑی کیسے نظر آتی ہے | |
| جدلی | _____ |
| دھندلا | _____ |
| کمزور | _____ |
| اداس | _____ |
| شرمندہ | _____ |
| شریف | _____ |
| لوٹھا | _____ |
| نامم | _____ |
| مشکل | _____ |
| فلرملو | _____ |
| گھبرا | _____ |
| تافا | _____ |
| کمزور | _____ |
| ست | _____ |
| سادہ | _____ |
| خوش | _____ |
| پریشان | _____ |
| بے صاف | _____ |
| نالائق | _____ |
| عقلدار | _____ |
| جھگڑا | _____ |
| _____ | _____ |

SEMANTIC DIFFERENTIAL FORMAT FOR 'AUTOMOBILE' CONCEPT

(HINDI LINGUISTIC TRANSLATION)

हमारी गाड़ी कैसी चज़र आती है

| | | |
|-------------|------------------------------|-------------|
| अदबी | ___:___:___:___:___:___:___: | बेअदबी |
| शैशान | ___:___:___:___:___:___:___: | धुन्धली |
| ताकतवर | ___:___:___:___:___:___:___: | कमज़ोर |
| शुश | ___:___:___:___:___:___:___: | उदास |
| अजीब | ___:___:___:___:___:___:___: | शाश्वत |
| बहादुर | ___:___:___:___:___:___:___: | शर्मिन्दा |
| जवान | ___:___:___:___:___:___:___: | बूढ़ा |
| तेज़ | ___:___:___:___:___:___:___: | सुस्त |
| सादा | ___:___:___:___:___:___:___: | माशिकल |
| बेफिक्र | ___:___:___:___:___:___:___: | फिक्रमन्द |
| जाहिर | ___:___:___:___:___:___:___: | गहिरा |
| पुराना | ___:___:___:___:___:___:___: | ताज़ा |
| तगड़ा | ___:___:___:___:___:___:___: | नाज़ुक |
| होशियार | ___:___:___:___:___:___:___: | नाकाम |
| शानदार | ___:___:___:___:___:___:___: | सादा |
| शौखी | ___:___:___:___:___:___:___: | रवामोश |
| मस्त | ___:___:___:___:___:___:___: | परेशान |
| भरोसेदार | ___:___:___:___:___:___:___: | नाकाम |
| सावधान | ___:___:___:___:___:___:___: | खतरनाक |
| बेमकसदी | ___:___:___:___:___:___:___: | मकसदी |
| खुला मिज़ाज | ___:___:___:___:___:___:___: | तन्ग मिज़ाज |
| आदमी जैसा | ___:___:___:___:___:___:___: | औसत जैसा |

APPENDIX A: 5

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SEMANTIC DIFFERENTIAL FORMAT FOR 'REAL' & 'IDEAL' STORES

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(SHEET 1)

PHYSICAL CHARACTERISTICS OF STORE

| | | |
|--------------------------------|------------------------------|-------------------------------------|
| DIRTY | ___:___:___:___:___:___:___: | CLEAN |
| ATTRACTIVE DECOR | ___:___:___:___:___:___:___: | UNATTRACTIVE DECOR |
| BRIGHT STORE | ___:___:___:___:___:___:___: | DULL STORE |
| EASY TO FIND
ITEMS YOU WANT | ___:___:___:___:___:___:___: | DIFFICULT TO FIND
ITEMS YOU WANT |
| GOOD DISPLAYS | ___:___:___:___:___:___:___: | BAD DISPLAYS |
| WELL-SPACED
MERCHANDISE | ___:___:___:___:___:___:___: | CRAMMED MERCHANDISE |
| WELL-ORGANISED LAYOUT | ___:___:___:___:___:___:___: | UNORGANISED LAYOUT |
| NEAT | ___:___:___:___:___:___:___: | MESSY |
| EASY TO MOVE
THROUGH STORE | ___:___:___:___:___:___:___: | DIFFICULT TO MOVE
THROUGH STORE |
| PLEASANT STORE
TO SHOP IN | ___:___:___:___:___:___:___: | UNPLEASANT STORE
TO SHOP IN |
| FAST CHECKOUT | ___:___:___:___:___:___:___: | SLOW CHECKOUT |

CONVENIENCE OF STORE FROM YOUR LOCATION

| | | |
|---------------------------------------|------------------------------|--|
| NEARBY | ___:___:___:___:___:___:___: | DISTANT |
| SHORT TIME REQUIRED
TO REACH STORE | ___:___:___:___:___:___:___: | LONG TIME REQUIRED
TO REACH STORE |
| DIFFICULT DRIVE | ___:___:___:___:___:___:___: | EASY DRIVE |
| DIFFICULT TO FIND
PARKING SPACE | ___:___:___:___:___:___:___: | EASY TO FIND |
| CONVENIENT TO
OTHER STORES I SHOP | ___:___:___:___:___:___:___: | INCONVENIENT TO OTHER
STORES I SHOP |

PRODUCTS OFFERED

| | | |
|---|------------------------------|--|
| WIDE SELECTION
OF DIFFERENT KINDS
OF PRODUCTS | ___:___:___:___:___:___:___: | LIMITED SELECTION
OF DIFFERENT KINDS
OF PRODUCTS |
| UNDEPENDABLE PRODUCT | ___:___:___:___:___:___:___: | DEPENDABLE PRODUCT |
| HIGH QUALITY | ___:___:___:___:___:___:___: | LOW QUALITY |
| NUMEROUS BRANDS | ___:___:___:___:___:___:___: | FEW BRANDS |
| UNKNOWN BRANDS | ___:___:___:___:___:___:___: | WELL KNOWN BRANDS |

SEMANTIC DIFFERENTIAL FORMAT FOR 'REAL' & 'IDEAL' STORES
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(SHEET 2)

PRICES CHARGED BY THE STORE

LOW COMPARED TO OTHER STORES	___:___:___:___:___:___:___:	HIGH COMPARED TO OTHER STORES
LOW VALUE FOR MONEY SPENT	___:___:___:___:___:___:___:	HIGH VALUE FOR MONEY SPENT
LARGE NUMBER OF ITEMS SPECIALLY PRICED	___:___:___:___:___:___:___:	SMALL NUMBER OF ITEMS SPECIALLY PRICED
GOOD BUYS ON PRODUCTS	___:___:___:___:___:___:___:	BAD BUYS ON PRODUCTS
GOOD SALES ON PRODUCTS	___:___:___:___:___:___:___:	BAD SALES ON PRODUCTS

STORE PERSONNEL

COURTEOUS	___:___:___:___:___:___:___:	DISCOURTEOUS
COLD	___:___:___:___:___:___:___:	STORE WORKERS ARE FRIENDLY
UNHELPFUL	___:___:___:___:___:___:___:	HELPFUL
ADEQUATE NUMBER	___:___:___:___:___:___:___:	INADEQUATE NUMBER

ADVERTISING BY THE STORE

UNINFORMATIVE	___:___:___:___:___:___:___:	INFORMATIVE
UNHELPFUL IN PLANNING PURCHASES	___:___:___:___:___:___:___:	HELPFUL IN PLANNING PURCHASES
APPEALING	___:___:___:___:___:___:___:	UNAPPEALING
BELIEVABLE	___:___:___:___:___:___:___:	MISLEADING
FREQUENTLY SEEN BY YOU	___:___:___:___:___:___:___:	INFREQUENTLY SEEN BY YOU

YOUR FRIENDS AND THE STORE

UNKNOWN TO YOUR FRIENDS	___:___:___:___:___:___:___:	WELL-KNOWN TO YOUR FRIENDS
WELL-LIKED BY YOUR FRIENDS	___:___:___:___:___:___:___:	DISLIKED BY YOUR FRIENDS
POORLY RECOMMENDED BY YOUR FRIENDS	___:___:___:___:___:___:___:	WELL-RECOMMENDED BY YOUR FRIENDS
NUMEROUS FRIENDS SHOP THERE	___:___:___:___:___:___:___:	FEW FRIENDS SHOP THERE

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سٹیو کی ریکارڈ

[illegible]

گھر میں پہنچے میں انسانی

[illegible]

کتابخانه

بہارِ نسیم کی فیضیں \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_  
 نئے کارخانے کا مال \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_  
 بہارِ انصاف \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_  
 کھجور کے پتوں کا مال \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_

اسی گھاٹیوں کی فیضیں \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_  
 جاتے یا جائے نام \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_ : \_\_\_\_\_

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سٹیورڈ کے ذرا م

| | | |
|---|----------------------|-------|
| | دوسری رو کاٹوں سے | ستارہ |
| _____ : _____ : _____ : _____ : _____ : | لاحق کے برابر کا مال | |
| _____ : _____ : _____ : _____ : _____ : | راحت کو کہی نہیں ملے | |
| _____ : _____ : _____ : _____ : _____ : | بیش مل فیہ مل | |
| _____ : _____ : _____ : _____ : _____ : | راحت پہ نہ فیہ مل | |
| _____ : _____ : _____ : _____ : _____ : | گھٹائی فیہ مل | |
| _____ : _____ : _____ : _____ : _____ : | راحت میرے کار فیہ مل | |

دوکان در

| | | | | | | | | |
|---------|---|---|---|---|---|---|---|--------------|
| درستانہ | : | : | : | : | : | : | : | بد دوستانہ |
| خوشنماج | : | : | : | : | : | : | : | کفایت و صلاح |
| مردار | : | : | : | : | : | : | : | بے کمالہ |
| کافی | : | : | : | : | : | : | : | کم |

سپر دکانیہ

سکھ فہرست میں شامل
 فہرست میں شامل

بھروسے دار : _____ L _____ : _____ : _____ : _____ : _____
 : _____ : _____ : _____ : _____ : _____

دوکان اور آبے کے واقف

وَأَمَّا مَنْ كَفَرَ بَعْدَ مَا جَاءَهُ بِالنَّبِيِّينَ فَهُمْ أَوْلَىٰ
وَأَمَّا مَنْ كَفَرَ بَعْدَ مَا جَاءَهُ بِالنَّبِيِّينَ فَهُمْ أَوْلَىٰ

در آئینوں کو پسند : : : : : واقفوں کو نہ پسند
 کس واقف زکمان یہ جانتے : : : : : اور میں ایسا واقف دوکان کا چاہتا

SEMANTIC DIFFERENTIAL FORMAT FOR 'REAL' & 'IDEAL' STORES

(HINDI LINGUISTIC TRANSLATION: SHEET 1)

स्टोर की दिखावट

मैला ___:___:___:___:___:___:___: साफ
 नदी सजावट ___:___:___:___:___:___:___: शानदार सजावट
 रौशन ___:___:___:___:___:___:___: मन्धेरा
 माल ढूँढना मुश्किल ___:___:___:___:___:___:___: माल ढूँढना आसान
 अच्छी सजावट ___:___:___:___:___:___:___: बुरी सजावट
 खुली सजावट ___:___:___:___:___:___:___: जकड़ी हुई सजावट
 कायेदे से सजा हुआ ___:___:___:___:___:___:___: गड़बड़ी से सजा हुआ
 फिरेने में आसानी ___:___:___:___:___:___:___: फिरेने में मुश्किल
 सफा ___:___:___:___:___:___:___: गन्दा
 खुशगवार ___:___:___:___:___:___:___: ना खुशगवार
 तेज़ हिसाब ___:___:___:___:___:___:___: सुस्त हिसाब

घर से पहुँचने में आसानी

नजदीक ___:___:___:___:___:___:___: दूर
 पहुँचने में थोड़ा वक्त ___:___:___:___:___:___:___: पहुँचने में बहुत वक्त
 मुश्किल रास्ता ___:___:___:___:___:___:___: आसान रास्ता
 गाड़ी खड़ी करता मुश्किल ___:___:___:___:___:___:___: गाड़ी खड़ी करता आसान
 ज़रूरत की दुकानों के नजदीक ___:___:___:___:___:___:___: ज़रूरत की दुकानों से दूर

विक्री का माल

कई किसम की चीज़ें ___:___:___:___:___:___:___: कम किसम की चीज़ें
 बेकार का माल ___:___:___:___:___:___:___: भरोसेदार माल
 बेहतरीन चीज़ें ___:___:___:___:___:___:___: चटीया चीज़ें
 कई हाथों की चीज़ें ___:___:___:___:___:___:___: आम हाथों की चीज़ें
 जाने-पहचाने नाम ___:___:___:___:___:___:___: अनजाने नाम


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UNPLEASANT _____:_____:_____:_____:_____:_____:_____ PLEASANT

BAD : : : : : GOOD

DISORDERLY : : : : : : : ORDERLY

POOR AD _____ : _____ : _____ : _____ : _____ : _____ : _____ : OUTSTANDING AD _____

BEAUTIFUL _____ : _____ : _____ : _____ : _____ : _____ : _____ : UGLY

FRIENDLY : : : : : : : UNFRIENDLY

FOR ME : : : : : : : : NOT FOR ME

WOULD LIKE TO ____:____:____:____:____:____:____: WOULD LIKE TO SEE
SEE MORE LESS

INTEREST ING : : : : : : : UN INTEREST ING

APPEALING _____ : _____ : _____ : _____ : _____ : _____ : _____ : UNAPPEALING

IMPRESSIVE : : : : : : : UNIMPRESSIVE

ATTRACTIVE : : : : : : : UNATTRACTIVE

UN INFORMAT IVE : : : : : : : INFORMAT IVE

CLEAR : : : : : : : CON FUSING

EYE-CATCHING : : : : : : : NOT EYE-CATCHING

REALISTIC : : : : : : : UNREALISTIC

MEANINGFUL _____ : _____ : _____ : _____ : _____ : _____ : _____ : MEANINGLESS

SOPHISTICATED : : : : : : : UNSOPHISTICATED

DIGNIFIED : : : : : : : UNDIGNIFIED

WITH REGARD TO SIMILAR PRODUCTS I FEEL THAT THIS PRODUCT IS

DISTINCTIVE : : : : : : : ORDINARY

DISAPPOINTING : : : : : : : SATISFACTORY

RISKY : : : : : : : SAFE

BAD : : : : : : : : : GOOD

SEMANTIC DIFFERENTIAL FORMAT FOR AD CONCEPT

(HINDI LINGUISTIC TRANSLATION)

हमारे रण्याल से यह इश्तहार कैसा महसूस होता है

| | | | | | | | |
|------------------------|-------|-------|-------|-------|-------|-------|------------------------|
| नाशुशगवार | _____ | _____ | _____ | _____ | _____ | _____ | रुशगवार |
| बुरा | _____ | _____ | _____ | _____ | _____ | _____ | अच्छा |
| गड़बड़ी | _____ | _____ | _____ | _____ | _____ | _____ | बाकायदा |
| घटीया | _____ | _____ | _____ | _____ | _____ | _____ | शानदार |
| खूबसूरत | _____ | _____ | _____ | _____ | _____ | _____ | बदसूरत |
| दौस्ताना | _____ | _____ | _____ | _____ | _____ | _____ | बैदौस्ताना |
| हमारे वास्ते | _____ | _____ | _____ | _____ | _____ | _____ | हमारे वास्ते नहीं |
| फिर देखने लायक | _____ | _____ | _____ | _____ | _____ | _____ | देखने लायक नहीं |
| दिलचस्प | _____ | _____ | _____ | _____ | _____ | _____ | बैकार |
| मकबूल | _____ | _____ | _____ | _____ | _____ | _____ | बैजार |
| शानदार | _____ | _____ | _____ | _____ | _____ | _____ | भद्दा |
| दिलकश | _____ | _____ | _____ | _____ | _____ | _____ | सादा |
| जानकारी नहीं देने वाला | _____ | _____ | _____ | _____ | _____ | _____ | जानकारी देने वाला |
| झाफ़ | _____ | _____ | _____ | _____ | _____ | _____ | धुन्धला |
| ध्यान में पड़ने वाला | _____ | _____ | _____ | _____ | _____ | _____ | ध्यान में न पड़ने वाला |
| असली | _____ | _____ | _____ | _____ | _____ | _____ | बनावटी |
| मकसद | _____ | _____ | _____ | _____ | _____ | _____ | बै मकसद |
| अदबी | _____ | _____ | _____ | _____ | _____ | _____ | बै अदबी |
| पायदार | _____ | _____ | _____ | _____ | _____ | _____ | नापायदार |

दूसरी गाड़ीयों के मुकाबले यह गाड़ी कैसी लगती है

| | | | | | | | |
|---------|-------|-------|-------|-------|-------|-------|----------|
| बैहतरिन | _____ | _____ | _____ | _____ | _____ | _____ | आम |
| बैकार | _____ | _____ | _____ | _____ | _____ | _____ | रज़ामन्द |
| खतरनाक | _____ | _____ | _____ | _____ | _____ | _____ | भरोसेदार |
| खराब | _____ | _____ | _____ | _____ | _____ | _____ | अच्छी |

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(GUJARATI LINGUISTIC TRANSLATION)

મહારા બચાવ પ્રમથે આ વિજ્ઞાપન કરી છે

ਪਸੰਦ _____ ਨਹੀਂ ਪਸੰਦ _____

ਅੰਤਰਿਕਸ਼ਿਤਾ - ਸਿਰਫ਼ ਇਕ ਪਾਸੇ ਤੋਂ ਹੋਣ ਵਾਲੀ ਪ੍ਰਕਾਸ਼ ਪ੍ਰਵਾਹ ਨੂੰ ਅੰਤਰਿਕਸ਼ਿਤਾ ਕਿਹਾ ਜਾਂਦਾ ਹੈ।

મન્ય વસિથત—:—:—:—:—:—:—:અનુક્રમ

ना.सु.म. ---:---:---:---:---:---:---:७२५

ਸਰਸ : : : : : ਨਥੀ ਮਲੁ

ਸੁਖੀ _____ ਦੁਖੀ

दाशदा —:—:—:—:—:—:—:—:—:अंउपयोमी

વધારે જોયેલ સારુ — : — : — : — : — : — : બોલુ જોયુ હોયુ નો સારુ

મજાતુ —:—:—:—:—:—:—:—: મજાતુ નથી

સુધા _____:_____:_____:_____:_____:_____:_____:સુધા

818 ५18 —:—:—:—:—:—:—: 818

ਸ੍ਰਿ ਏਤ — : — : — : — : — : — : ਅੰਤ

નથી જ બાવત — : — : — : — : — : — : જ બાવે છે

ਸ੍ਰੀ ਘੋਸ਼ _____ ਸ਼ੰਕਰ

विशेष ---:---:---:---:---:---:---: साधा २५।

स्वभाविक ---:---:---:---:---:---:---: अस्वभाविक

ಪ್ರಶ್ನೆ : _____ : _____ : _____ : _____ : _____ : _____ : _____ : ಪ್ರತಿಭಾ ವಿಕಾಸ

२१।७ य ---:---:---:---:---:---:---: २५ २४।७ य

ભલું — : — : — : — : — : — : મેલુ થેલુ

[illegible]

વિજી ગાડી કરતાં આ ગાડી કેટલી સારી છે

विशेष —:—:—:—:—:—:—: साध्या २५

જાડામ —:—:—:—:—:—:—:—: અંતોષ

ਅੰਤਰਿਕ _____: _____: _____: _____: _____: _____: _____: ਅੰਤਰਿਕ ਦਾ 2

24161 — : — : — : — : — : — : 24122

APPENDIX A: 7 EXPERIMENTAL TEST AD-LAYOUTS
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Aston University

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APPENDIX B  
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APPENDIX B ~~~~~

INFORMATION PROCESSING OF DETERGENT ATTRIBUTES ~~~~~

This section includes the semantic differential format used for profiling the information processing of detergent attributes, followed by profiles obtained for the relative importance of these attributes, as perceived by the Asian and West Indian ethnic groups, each in comparison to the white group. The appendices are as follows:-

- APPENDIX B: 1 SEMANTIC DIFFERENTIAL FORMAT FOR DETERGENT
 ATTRIBUTE PROFILES
- APPENDIX B: 2 SEMANTIC DIFFERENTIAL PROFILES FOR
 DETERGENT ATTRIBUTES

APPENDIX B: 1

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SEMANTIC DIFFERENTIAL FORMAT FOR DETERGENT ATTRIBUTE PROFILES

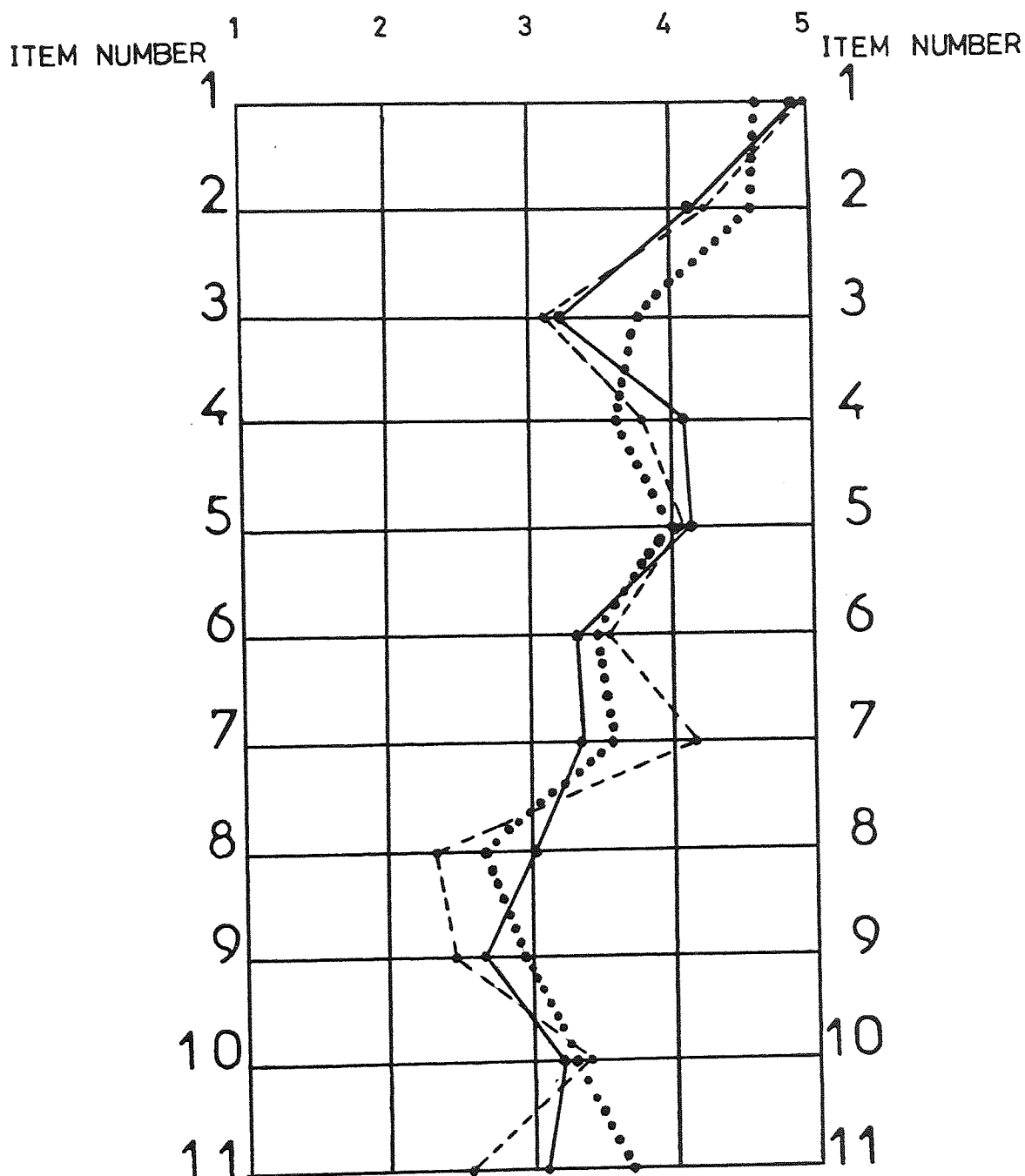
~~~~~

| ITEM NUMBER | DETERGENT ATTRIBUTE |
|-------------|--------------------------|
| 1 | CLEANING CAPACITY |
| 2 | WHITENING CAPACITY |
| 3 | SUDSINESS |
| 4 | MILDNESS TO CLOTHES |
| 5 | MILDNESS TO SKIN |
| 6 | QUANTITY PER LOAD |
| 7 | DETERGENT PRICE |
| 8 | BRAND NAME |
| 9 | RECOMENDATION BY FRIENDS |
| 10 | PACK SIZE |
| 11 | DETERGENT FRAGRANCE |

* SCORES RANGED FROM '1' TO '5'. THE HIGHER THE SCORE, THE MORE IMPORTANT THE RATING

APPENDIX B: 2
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SEMANTIC DIFFERENTIAL PROFILES FOR DETERGENT ATTRIBUTES  
~~~~~



KEY: WHITE ———
ASIAN ETHNIC
WEST INDIAN ETHNIC ---

APPENDIX C
~~~~~

## APPENDIX C ~~~~~

### INFORMATION PROCESSING OF AUTOMOBILE ATTRIBUTES ~~~~~

This section contains the semantic differential format used for testing the relative importance of automobile product attributes acrosss the Asian, West Indian ethnic and white groups, followed by semantic differential profiles drawn up for the ratings on six product specific attributes. In order, the appendices are:-

APPENDIX C: 1	SEMANTIC DIFFERENTIAL FORMAT FOR AUTOMOBILE ATTRIBUTE PROFILES
APPENDIX C: 2	SEMANTIC DIFFERENTIAL PROFILES FOR AUTOMOBILE ATTRIBUTES

APPENDIX C: 1  
~~~~~

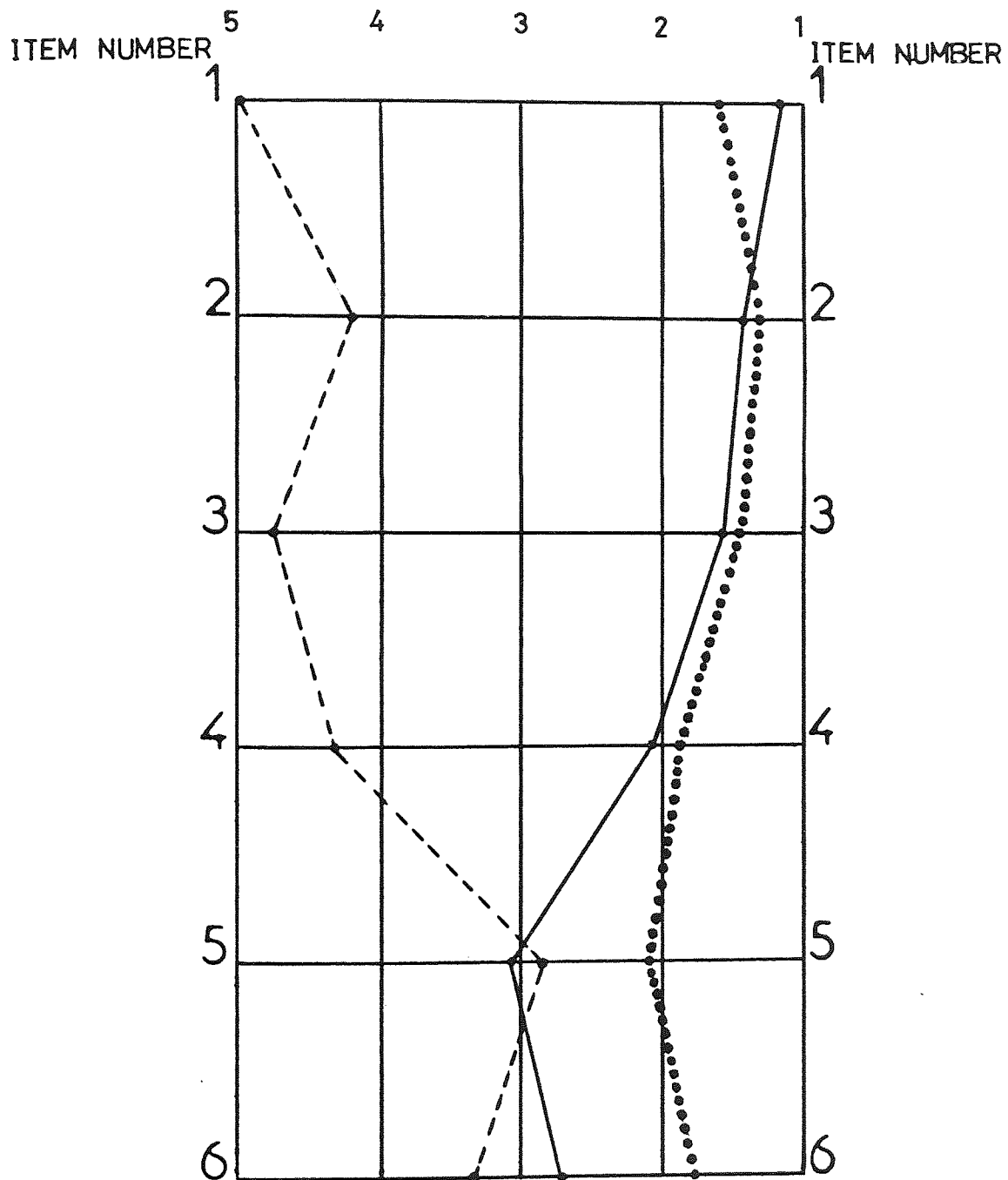
SEMANTIC DIFFERENTIAL FORMAT FOR AUTOMOBILE ATTRIBUTE
~~~~~  
PROFILES  
~~~~~

| ITEM NUMBER
~~~~~ | AUTOMOBILE ATTRIBUTE
~~~~~ |
|----------------------|-------------------------------|
| 1 | RELIABILITY |
| 2 | PERFORMANCE |
| 3 | CAR PRICE |
| 4 | PRODUCT REPUTATION |
| 5 | RECOMMENDATION BY FRIENDS |
| 6 | DEALERS |

* SCORES RANGED FROM '1' TO '5', FOR 'VERY IMPORTANT' TO 'VERY UNIMPORTANT'. THE LOWER THE MEAN SCORE, THE MORE IMPORTANT WAS THE RATING.

APPENDIX C: 2
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SEMANTIC DIFFERENTIAL PROFILES FOR AUTOMOBILE ATTRIBUTES  
~~~~~



KEY: WHITE ———
 ASIAN ETHNIC
 WEST INDIAN ETHNIC - - -

APPENDIX D
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## APPENDIX D ~~~~~

### SEMANTIC DIFFERENTIAL DATA ON 'SELF' & 'AUTOMOBILE' CONCEPTS ~~~~~

This section contains the following four aspects of the data analysis:-

- APPENDIX D: 1      SEMANTIC DIFFERENTIAL FORMAT FOR 'SELF' & 'AUTOMOBILE' CONCEPTS
- APPENDIX D: 2      'SELF CONCEPT' COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC AND WHITE GROUPS
- APPENDIX D: 3      'SELF' CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WEST INDIAN ETHNIC AND WHITE GROUPS
- APPENDIX D: 4      'SELF' AND 'CAR' CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WHITE GROUP
- APPENDIX D: 5      'SELF' AND 'CAR' CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC GROUP

A comparison of 'Self' and 'Car' concepts for the West Indian group was not considered feasible because of the low response rate for the 'car' concept (N=2), within this group.

APPENDIX D: 1  
~~~~~

SEMANTIC DIFFERENTIAL FORMAT FOR 'SELF' & 'AUTOMOBILE' CONCEPTS
~~~~~

<u>ITEM NUMBER</u>	<u>ITEM DESCRIPTION</u>
1	UNSOPHISTICATED-SOPHISTICATED
2	DULL-EXCITING
3	WEAK-STRONG
4	SAD-HAPPY
5	CONVENTIONAL-ECCENTRIC
6	SHY-BOLD
7	OLD-YOUNG
8	CLUMSY-NIMBLE
9	COMPLEX-SIMPLE
10	BUSINESSLIKE-SPORTY
11	SUBTLE-OBVIOUS
12	STALE-FRESH
13	FRAGILE-ROBUST
14	SLOW-SWIFT
15	PLAIN-ELEGANT
16	CALM-LIVELY
17	THRIFTY-INDULGENT
18	UNRELIABLE-RELIABLE
19	DELIBERATE-IMPULSIVE
21	CRAMPED-SPACIOUS
20	MASCULINE FEMININE

\* SCORES RANGED FROM '1' TO '7', WITH '1' REPRESENTING THE LEFT  
END, AND '7' THE RIGHT END OF THE SEMANTIC SCALE.

APPENDIX D: 2

'SELF' CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE

LEVELS FOR THE ASIAN ETHNIC AND WHITE GROUPS

<u>ITEM NO.</u>	<u>WHITE</u> (N=37)	<u>ASIAN</u> (N=85)	<u>'t' VALUE</u>	<u>SIG.</u> <u>LEVEL</u>	<u>DIRECTION</u>
1	3.67	5.27	-5.98	.001	ASIAN
2	3.97	4.92	-3.03	.01	ASIAN
3	4.08	4.70	-2.02	.05	ASIAN
4	5.91	5.50	1.50	NS	-
5	2.67	3.12	-1.28	NS	-
6	4.14	4.29	-0.43	NS	-
7	3.51	4.80	-4.06	.001	ASIAN
8	4.70	5.28	-1.98	.05	ASIAN
9	3.24	5.44	-7.67	.001	-
10	4.54	4.03	1.33	NS	-
11	4.83	5.00	-0.50	NS	-
12	5.70	5.29	1.62	NS	-
13	4.70	4.76	-0.16	NS	-
14	4.56	4.86	-0.82	NS	-
15	3.08	3.37	-0.87	NS	-
16	5.70	4.08	5.16	.001	WHITE
17	3.92	4.53	-1.54	NS	-
18	6.24	6.02	0.86	NS	-
19	6.29	5.89	1.83	.10	WHITE
20	5.08	3.08	5.47	.001	WHITE
21	4.54	5.27	-2.32	.01	ASIAN
<u>AVERAGE</u> <u>SCORE</u>	4.52	4.69	-1.98	.05	ASIAN



APPENDIX D: 3  
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'SELF' CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE
~~~~~

LEVELS FOR THE WEST INDIAN ETHNIC AND WHITE GROUPS  
~~~~~

| ITEM NO. | WHITE
MEAN
(N=37) | WEST INDIAN
MEAN
(N=15) | 't' VALUE | SIG.
LEVEL | DIRECTION |
|------------------|-------------------------|-------------------------------|-----------|---------------|-------------|
| 1 | 3.67 | 4.60 | -2.87 | .01 | WEST INDIAN |
| 2 | 3.97 | 4.53 | -1.57 | NS | - |
| 3 | 4.08 | 5.00 | -2.18 | .05 | WEST INDIAN |
| 4 | 5.91 | 4.93 | 2.76 | .01 | WHITE |
| 5 | 2.67 | 3.86 | -2.33 | .05 | WEST INDIAN |
| 6 | 4.13 | 4.73 | -1.51 | NS | - |
| 7 | 3.51 | 4.26 | -1.89 | .10 | WEST INDIAN |
| 8 | 4.70 | 5.40 | -1.56 | NS | - |
| 9 | 3.24 | 3.80 | -2.23 | .05 | WEST INDIAN |
| 10 | 4.54 | 5.46 | -1.90 | .10 | WEST INDIAN |
| 11 | 4.84 | 5.13 | -0.72 | NS | - |
| 12 | 5.70 | 5.53 | 0.48 | NS | - |
| 13 | 4.70 | 4.53 | 0.32 | NS | - |
| 14 | 4.56 | 5.67 | -2.15 | .05 | WEST INDIAN |
| 15 | 3.08 | 4.06 | -1.95 | .10 | WEST INDIAN |
| 16 | 5.70 | 5.47 | 0.55 | NS | - |
| 17 | 3.92 | 5.53 | -3.14 | .01 | WEST INDIAN |
| 18 | 6.24 | 5.60 | 1.65 | NS | - |
| 19 | 6.29 | 5.53 | 2.66 | .01 | WHITE |
| 20 | 5.08 | 4.73 | 0.85 | NS | - |
| 21 | 4.54 | 5.66 | -2.63 | .01 | WEST INDIAN |
| AVERAGE
SCORE | 4.52 | 4.95 | -2.20 | .05 | WEST INDIAN |

APPENDIX D: 4

'SELF' & 'CAR' CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE
LEVELS FOR THE WHITE GROUP

| ITEM NO. | 'SELF'
MEAN
(N=37) | 'CAR'
MEAN
(N=7) | 't' VALUE | SIG.
LEVEL | DIRECTION |
|------------------|--------------------------|------------------------|-----------|---------------|-----------|
| 1 | 3.67 | 4.42 | -1.05 | NS | - |
| 2 | 3.97 | 5.43 | -2.65 | .05 | 'CAR' |
| 3 | 4.08 | 6.00 | -4.68 | .001 | 'CAR' |
| 4 | 5.92 | 6.43 | -1.06 | NS | - |
| 5 | 2.67 | 3.67 | -1.33 | NS | - |
| 6 | 4.13 | 5.43 | -2.23 | .05 | 'CAR' |
| 7 | 3.51 | 5.00 | -2.92 | .01 | 'CAR' |
| 8 | 4.70 | 6.00 | -2.55 | .05 | 'CAR' |
| 9 | 3.24 | 4.71 | -2.63 | .05 | 'CAR' |
| 10 | 4.54 | 4.14 | 0.56 | NS | - |
| 11 | 4.84 | 5.14 | -0.57 | NS | - |
| 12 | 5.70 | 5.57 | 0.25 | NS | - |
| 13 | 4.70 | 5.42 | -1.24 | NS | - |
| 14 | 4.57 | 5.43 | -1.31 | NS | - |
| 15 | 3.08 | 5.00 | -2.47 | .05 | 'CAR' |
| 16 | 5.70 | 5.28 | 0.73 | NS | - |
| 17 | 3.92 | 3.86 | 0.08 | NS | - |
| 18 | 6.24 | 6.71 | -1.64 | NS | - |
| 19 | 6.29 | 6.72 | -1.64 | NS | - |
| 20 | 5.08 | 4.14 | 1.84 | .10 | - |
| 21 | 4.54 | 5.71 | -2.31 | .05 | 'CAR' |
| AVERAGE
SCORE | 4.52 | 5.24 | -2.08 | .10 | 'CAR' |

APPENDIX D: 5
~~~~~

'SELF' & 'CAR' CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE  
~~~~~  
LEVELS FOR THE ASIAN ETHNIC GROUP
~~~~~

<u>ITEM NO.</u>	<u>'SELF'</u> <u>MEAN</u> (N=85)	<u>'CAR'</u> <u>MEAN</u> (N=14)	<u>'t' VALUE</u>	<u>SIG.</u> <u>LEVEL</u>	<u>DIRECTION</u>
1	5.27	4.71	1.09	NS	-
2	4.92	5.78	-2.55	.05	'CAR'
3	4.71	5.64	-2.42	.05	'CAR'
4	5.50	5.86	-0.99	NS	-
5	3.11	3.71	-0.94	NS	-
6	4.29	4.50	-0.43	NS	-
7	4.80	4.85	-0.11	NS	-
8	5.28	5.00	0.71	NS	-
9	5.45	4.71	1.45	NS	-
10	4.03	3.28	1.31	NS	-
11	5.00	5.36	-0.90	NS	-
12	5.29	4.92	0.64	NS	-
13	4.76	5.86	-3.77	.001	'CAR'
14	4.86	5.86	-2.86	.01	'CAR'
15	3.37	4.64	-2.07	.05	'CAR'
16	4.08	5.43	-2.97	.01	'CAR'
17	4.53	4.00	0.94	NS	-
18	6.02	6.14	-0.42	NS	-
19	5.89	6.07	-0.55	NS	-
20	3.08	4.43	-2.52	.05	'CAR'
21	5.27	5.36	-0.16	NS	-
<u>AVERAGE</u> <u>SCORE</u>	4.69	5.09	-2.06	.10	'CAR'

APPENDIX E  
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APPENDIX E ~~~~~

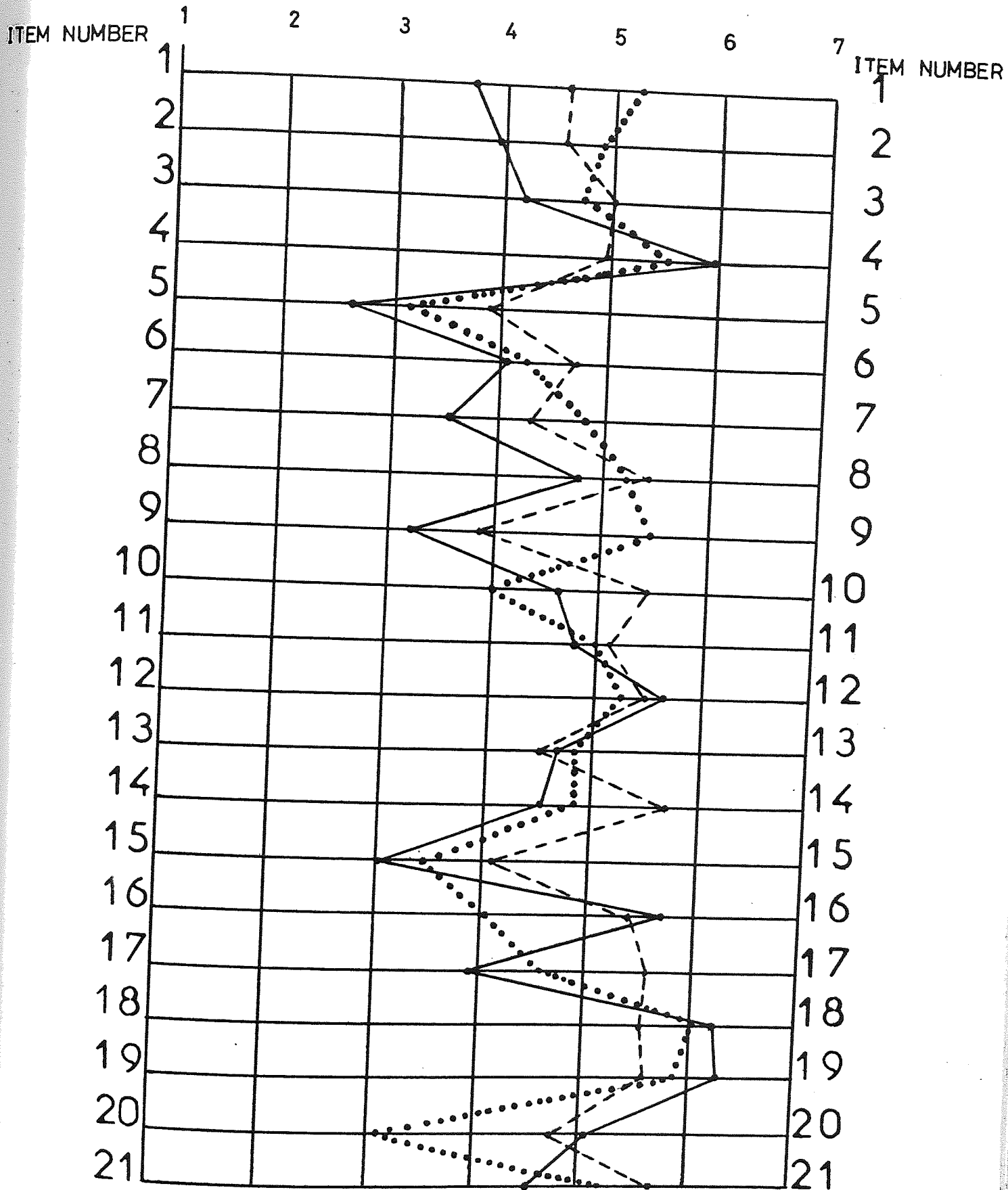
SEMANTIC DIFFERENTIAL PROFILES ON 'SELF' & 'AUTOMOBILE' ~~~~~

CONCEPTS ~~~~~

This section includes the semantic differential profiles relating to the 'self' and 'car' concepts, in the attempt to trace the degree of congruity between the two concepts. In order, these are:-

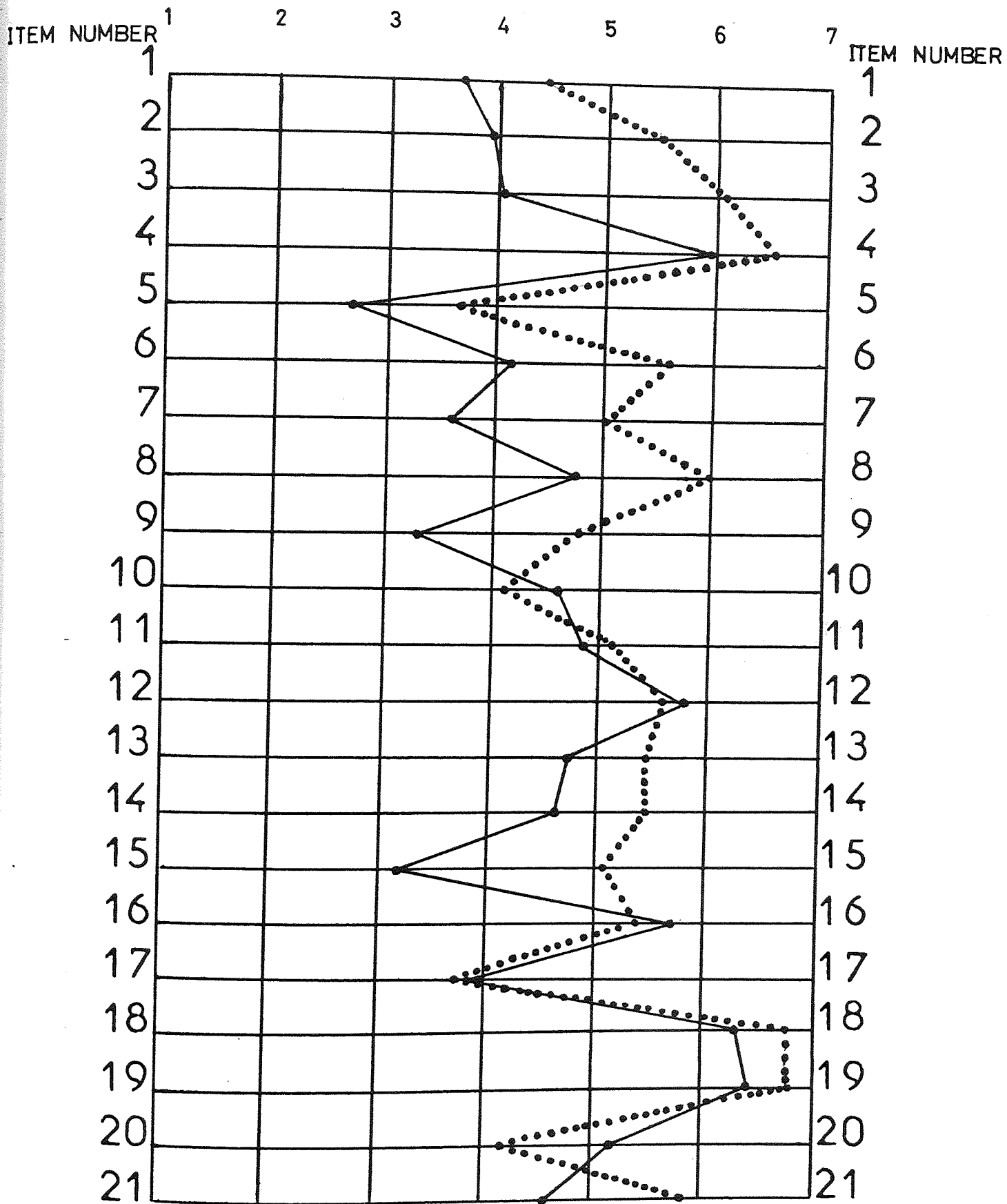
- APPENDIX E: 1 SEMANTIC DIFFERENTIAL PROFILES FOR THE
 'SELF' CONCEPT
- APPENDIX E: 2 'SELF' & 'CAR' PROFILES FOR THE WHITE
 GROUP
- APPENDIX E: 3 'SELF' & 'CAR' PROFILES FOR THE ASIAN
 ETHNIC GROUP

SEMANTIC DIFFERENTIAL PROFILES FOR THE 'SELF' CONCEPT



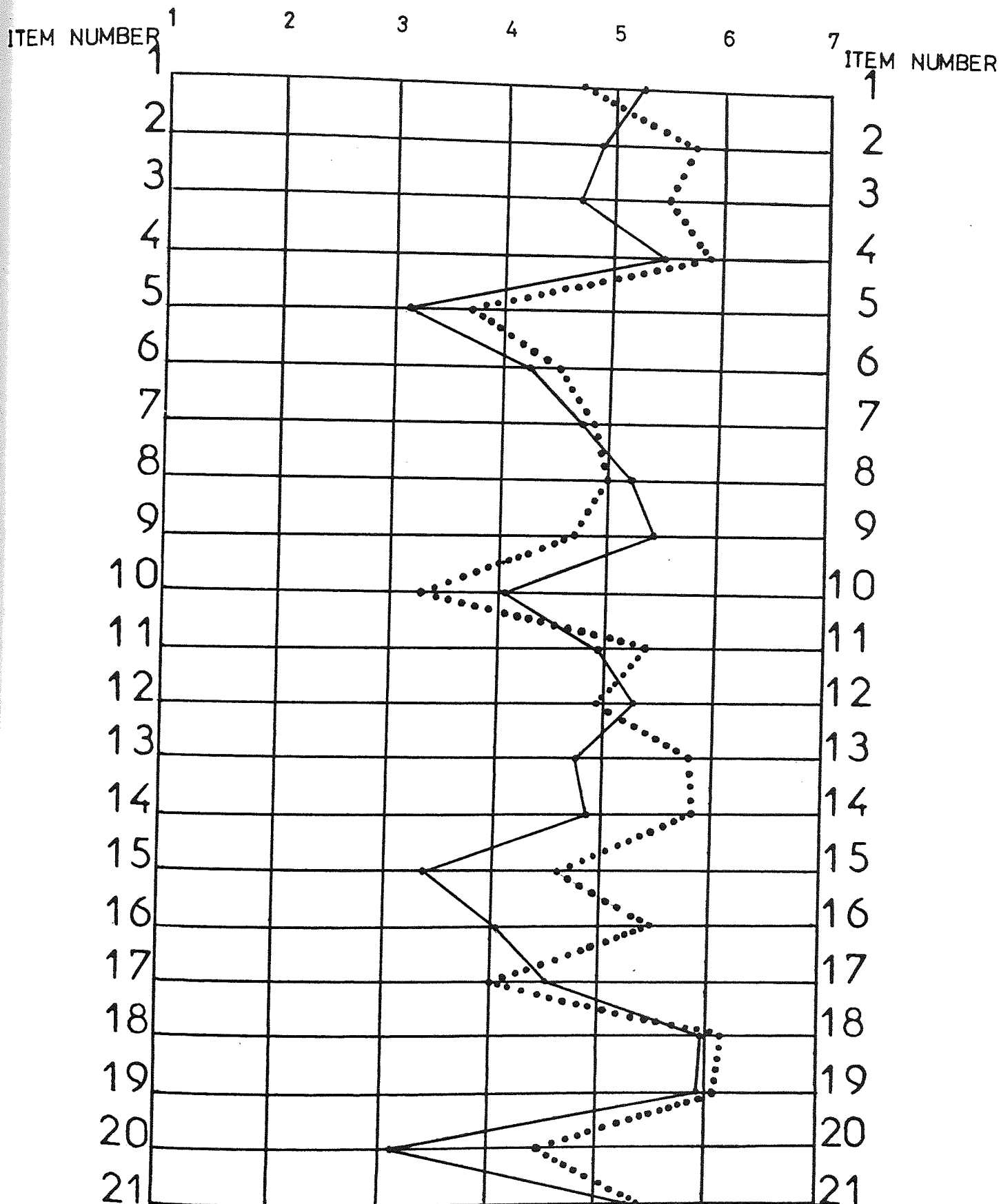
KEY: WHITE —
 ASIAN ETHNIC
 WEST INDIAN ETHNIC ----

'SELF' & 'CAR' PROFILES FOR THE WHITE GROUP



KEY: 'SELF' —
'CAR'

'SELF' & 'CAR' PROFILES FOR THE ASIAN ETHNIC GROUP



KEY: 'SELF' —
 'CAR'

APPENDIX F
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## APPENDIX F ~~~~~

### ETHNIC MEDIA PUBLICATIONS FORMAT ~~~~~

This section includes the mastheads of the ethnic publications that were surveyed for readership levels in the Asian ethnic group. It aims to give a general overview of the ethnic publications in circulation, as well as their cover prices in comparison to white-oriented consumer magazines and newspapers.



Aston University

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APPENDIX G  
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This section contains appendices relating to the four ad treatments, in the following order:-

- APPENDIX G: 1 SEMANTIC DIFFERENTIAL FORMAT FOR TESTING AD EFFECTIVENESS
- APPENDIX G: 2 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC AND WHITE GROUPS
- APPENDIX G: 3 'INTEGRATED' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC AND WHITE GROUPS
- APPENDIX G: 4 'ETHNIC' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC AND WHITE GROUPS
- APPENDIX G: 5 'CAR-ONLY' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC AND WHITE GROUPS
- APPENDIX G: 6 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WEST INDIAN ETHNIC AND WHITE GROUPS
- APPENDIX G: 7 'CAR-ONLY' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WEST INDIAN ETHNIC AND WHITE GROUPS
- APPENDIX G: 8 'INTEGRATED' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WHITE GROUP
- APPENDIX G: 9 'ETHNIC' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WHITE GROUP
- APPENDIX G:10 'CAR-ONLY' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WHITE GROUP
- APPENDIX G:11 'INTEGRATED' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC GROUP
- APPENDIX G:12 'ETHNIC' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC GROUP
- APPENDIX G:13 'CAR-ONLY' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC GROUP
- APPENDIX G:14 'CAR-ONLY' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WEST INDIAN ETHNIC GROUP

APPENDIX G: 1

SEMANTIC DIFFERENTIAL FORMAT FOR TESTING AD EFFECTIVENESS

| <u>ITEM NUMBER</u> | <u>AD ITEM</u> |
|--------------------|---|
| 1 | UNPLEASANT-PLEASANT |
| 2 | BAD-GOOD |
| 3 | DISORDERLY-ORDERLY |
| 4 | POOR-OUTSTANDING |
| 5 | UGLY-BEAUTIFUL |
| 6 | UNFRIENDLY-FRIENDLY |
| 7 | NOT FOR ME-FOR ME |
| 8 | WOULD LIKE TO SEE LESS-WOULD LIKE TO SEE MORE |
| 9 | UNINTERESTING-INTERESTING |
| 10 | UNAPPEALING-APPEALING |
| 11 | UNIMPRESSIVE-IMPRESSIVE |
| 12 | UNATTRACTIVE-ATTRACTIVE |
| 13 | UNINFORMATIVE-INFORMATIVE |
| 14 | CONFUSING-CLEAR |
| 15 | NOT EYE CATCHING-EYE CATCHING |
| 16 | UNREALISTIC-REALISTIC |
| 17 | MEANINGLESS-MEANINGFUL |
| 18 | UNSOPHISTICATED-SOPHISTICATED |
| 19 | UNDIGNIFIED-DIGNIFIED |
| 20 | MASCULINE-FEMININE |

* SCORES RANGED FROM '1'-'7'. THE HIGHER THE MEAN SCORE, THE MORE TO THE POSITIVE END OF THE SEMANTIC SCALE

APPENDIX G: 2
~~~~~

'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE  
~~~~~  
LEVELS FOR THE ASIAN ETHNIC AND WHITE GROUPS
~~~~~

ITEM NO.	WHITE MEAN (N=18)	ASIAN ETHNIC MEAN (N=50)	't' VALUE	SIG. LEVEL	DIRECTION
1	5.50	6.02	-1.03	NS	-
2	5.00	6.08	-1.99	.10	ASIAN
3	5.27	5.60	-0.64	NS	-
4	4.28	5.38	-2.14	.05	ASIAN
5	4.39	5.68	-3.65	.001	ASIAN
6	5.28	5.96	-1.85	.10	ASIAN
7	3.33	3.98	-1.02	NS	-
8	4.39	4.74	-0.76	NS	-
9	4.00	5.70	-3.60	.01	ASIAN
10	4.11	5.34	-2.40	.05	ASIAN
11	4.39	5.64	-2.23	.05	ASIAN
12	4.66	5.28	-1.33	NS	-
13	3.28	4.04	-1.47	NS	-
14	4.33	5.36	-1.87	.10	ASIAN
15	4.67	5.10	-0.76	NS	-
16	4.06	5.14	-2.05	.05	ASIAN
17	3.55	4.82	-2.08	.05	ASIAN
18	5.11	6.16	-2.67	.01	ASIAN
19	4.50	5.86	-2.79	.01	ASIAN
20	6.17	6.28	-0.51	NS	-
<u>AVERAGE SCORE</u>	4.51	5.41	-3.15	.01	ASIAN

APPENDIX G: 3

'INTEGRATED' AD CONCEPT COMPARISONS: 't' VALUES AND  
SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC AND WHITE GROUPS

<u>ITEM NO.</u>	<u>WHITE</u> <u>MEAN</u> (N=16)	<u>ASIAN ETHNIC</u> <u>MEAN</u> (N=50)	<u>'t' VALUE</u>	<u>SIG.</u> <u>LEVEL</u>	<u>DIRECTION</u>
1	5.93	6.20	-0.73	NS	-
2	4.00	6.06	-4.57	.001	ASIAN
3	4.44	5.94	-2.95	.01	ASIAN
4	2.87	5.70	-6.75	.001	ASIAN
5	4.50	5.74	-2.35	.05	ASIAN
6	6.06	6.14	-0.24	NS	-
7	2.50	4.68	-3.73	.001	ASIAN
8	4.12	5.56	-2.56	.05	ASIAN
9	3.06	5.44	-4.51	.001	ASIAN
10	2.81	5.44	-5.03	.001	ASIAN
11	3.06	5.42	-3.89	.001	ASIAN
12	4.87	5.46	-1.06	NS	-
13	2.81	4.80	-3.40	.01	ASIAN
14	2.75	5.04	-3.76	.001	ASIAN
15	3.43	5.26	-3.09	.01	ASIAN
16	3.12	3.96	-1.36	NS	-
17	2.50	5.14	-5.05	.001	ASIAN
18	4.75	6.12	-2.48	.05	ASIAN
19	3.94	6.16	-3.61	.01	ASIAN
20	6.50	5.98	2.35	.05	WHITE
<u>AVERAGE</u> <u>SCORE</u>	3.90	5.51	-5.06	.001	ASIAN



APPENDIX G: 4

'ETHNIC' AD CONCEPT COMPARISONS: 't' VALUES AND  
SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC AND WHITE GROUPS

<u>ITEM NO.</u>	<u>WHITE MEAN (N=11)</u>	<u>ASIAN ETHNIC MEAN (N=50)</u>	<u>'t' VALUE</u>	<u>SIG. LEVEL</u>	<u>DIRECTION</u>
1	6.54	6.42	0.41	NS	-
2	5.27	6.10	-1.34	NS	-
3	5.09	5.78	-0.95	NS	-
4	4.36	5.98	-3.25	.01	ASIAN
5	5.63	6.14	-0.79	NS	-
6	6.45	6.16	0.76	NS	-
7	3.09	5.40	-3.17	.01	ASIAN
8	3.91	6.10	-3.68	.01	ASIAN
9	4.18	6.30	-3.14	.01	ASIAN
10	4.45	5.92	-2.09	.10	ASIAN
11	5.18	5.98	-1.23	NS	-
12	5.27	5.62	-0.52	NS	-
13	4.54	4.74	-0.26	NS	-
14	2.00	5.78	-9.68	.001	ASIAN
15	5.27	6.18	-1.21	NS	-
16	2.09	5.58	-7.86	.001	ASIAN
17	3.09	5.46	-3.78	.01	ASIAN
18	5.54	6.22	-1.13	NS	-
19	5.63	6.44	-1.34	NS	-
20	7.00	5.90	7.66	.001	WHITE
<u>AVERAGE SCORE</u>	4.73	5.91	-2.98	.01	ASIAN

APPENDIX G: 5

'CAR-ONLY' AD CONCEPT COMPARISONS: 't' VALUES AND  
SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC AND WHITE GROUPS

<u>ITEM NO.</u>	<u>WHITE</u> <u>MEAN</u> (N=15)	<u>ASIAN ETHNIC</u> <u>MEAN</u> (N=50)	<u>'t' VALUE</u>	<u>SIG.</u> <u>LEVEL</u>	<u>DIRECTION</u>
1	6.27	6.08	0.57	NS	-
2	6.00	6.08	-0.21	NS	-
3	6.13	6.20	-0.18	NS	-
4	4.07	5.86	-5.32	.001	ASIAN
5	4.66	5.40	-1.72	NS	-
6	5.20	5.52	-0.69	NS	-
7	4.73	5.18	-0.66	NS	-
8	5.07	5.70	-1.61	NS	-
9	5.07	5.70	-1.61	NS	-
10	4.60	5.60	-1.66	NS	-
11	5.40	5.98	-1.22	NS	-
12	5.33	5.94	-1.21	NS	-
13	3.80	5.66	-3.43	.01	ASIAN
14	4.33	6.04	-2.71	.01	ASIAN
15	4.60	5.64	-1.60	NS	-
16	5.00	5.56	-0.95	NS	-
17	4.26	5.34	-1.73	.10	ASIAN
18	5.26	6.24	-1.87	.10	ASIAN
19	5.33	6.24	-2.23	.05	ASIAN
20	3.40	3.76	-1.23	NS	-
<u>AVERAGE</u> <u>SCORE</u>	4.93	5.68	-2.42	.05	ASIAN

APPENDIX G: 6

'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE  
LEVELS FOR THE WEST INDIAN ETHNIC AND WHITE GROUPS

ITEM NO.	WHITE MEAN (N=18)	WEST INDIAN MEAN (N=11)	't' VALUE	SIG. LEVEL	DIRECTION
1	5.50	6.00	-0.87	NS	-
2	5.00	5.63	-1.11	NS	-
3	5.27	3.91	1.95	.10	WHITE
4	4.28	3.18	1.68	.10	WHITE
5	4.39	5.09	-1.35	NS	-
6	5.27	6.00	-1.34	NS	-
7	3.33	2.45	1.12	NS	-
8	4.39	3.91	0.88	NS	-
9	4.00	4.36	-0.54	NS	-
10	4.11	4.27	-0.25	NS	-
11	4.39	4.27	0.17	NS	-
12	4.67	5.09	-0.78	NS	-
13	3.28	4.36	-1.47	NS	-
14	4.33	2.72	2.01	.10	WHITE
15	4.67	3.45	1.45	NS	-
16	4.05	5.27	-1.90	.10	WEST INDIAN
17	3.55	3.27	0.36	NS	-
18	5.11	4.54	0.87	NS	-
19	4.50	4.18	0.46	NS	-
20	6.16	5.81	0.93	NS	-
AVERAGE SCORE	4.50	4.39	0.34	NS	-

APPENDIX G: 7  
~~~~~

'CAR-ONLY' AD CONCEPT COMPARISONS: 't' VALUES & SIGNIFICANCE
~~~~~  
LEVELS FOR THE WEST INDIAN ETHNIC AND WHITE GROUPS  
~~~~~

| ITEM NO. | WHITE
MEAN
(N=15) | WEST INDIAN
MEAN
(N=10) | 't' VALUE | SIG.
LEVEL | DIRECTION |
|------------------|-------------------------|-------------------------------|-----------|---------------|-------------|
| 1 | 6.27 | 5.40 | 1.73 | .10 | WHITE |
| 2 | 6.00 | 5.30 | 1.44 | NS | - |
| 3 | 6.13 | 6.90 | -2.11 | .05 | WEST INDIAN |
| 4 | 4.06 | 3.70 | 0.82 | NS | - |
| 5 | 4.67 | 5.20 | -0.93 | NS | - |
| 6 | 5.20 | 6.60 | -2.85 | .01 | WEST INDIAN |
| 7 | 4.73 | 2.50 | 2.74 | .01 | WHITE |
| 8 | 5.07 | 4.10 | 1.69 | NS | - |
| 9 | 5.06 | 4.90 | 0.23 | NS | - |
| 10 | 4.60 | 4.60 | 0.00 | NS | - |
| 11 | 5.40 | 6.30 | -1.48 | NS | - |
| 12 | 5.33 | 4.20 | 1.49 | NS | - |
| 13 | 3.80 | 5.80 | -2.77 | .01 | WEST INDIAN |
| 14 | 4.33 | 6.10 | -2.09 | .05 | WEST INDIAN |
| 15 | 4.60 | 2.70 | 2.05 | .10 | WHITE |
| 16 | 5.00 | 4.20 | 0.99 | NS | - |
| 17 | 4.27 | 3.10 | 1.39 | NS | - |
| 18 | 5.26 | 5.70 | -0.71 | NS | - |
| 19 | 5.33 | 5.40 | -0.13 | NS | - |
| 20 | 3.46 | 2.50 | 2.12 | .10 | WHITE |
| AVERAGE
SCORE | 4.93 | 4.76 | 0.50 | NS | - |

APPENDIX G: 8

'INTEGRATED' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES
AND SIGNIFICANCE LEVELS FOR THE WHITE GROUP

| ITEM NO. | 'WHITE' AD
MEAN
(N=18) | 'INTEGRATED' AD
MEAN
(N=16) | 't' VALUE | SIG.
LEVEL | DIRECTION |
|--------------------------|------------------------------|-----------------------------------|-----------|---------------|-----------------|
| 1 | 5.50 | 5.93 | -0.74 | NS | - |
| 2 | 5.00 | 4.00 | 1.47 | NS | - |
| 3 | 5.27 | 4.44 | 1.23 | NS | - |
| 4 | 4.28 | 2.87 | 2.25 | .05 | 'WHITE' AD |
| 5 | 4.39 | 4.50 | -0.19 | NS | - |
| 6 | 5.27 | 6.06 | -1.75 | .10 | 'INTEGRATED' AD |
| 7 | 3.33 | 2.50 | 1.05 | NS | - |
| 8 | 4.39 | 4.12 | 0.39 | NS | - |
| 9 | 4.00 | 3.06 | 1.44 | NS | - |
| 10 | 4.11 | 2.81 | 1.89 | .10 | 'WHITE' AD |
| 11 | 4.39 | 3.06 | 1.72 | .10 | 'WHITE' AD |
| 12 | 4.67 | 4.87 | -0.32 | NS | - |
| 13 | 3.28 | 2.81 | 0.65 | NS | - |
| 14 | 4.33 | 2.75 | 2.11 | .05 | 'WHITE' AD |
| 15 | 4.67 | 3.43 | 1.61 | NS | - |
| 16 | 4.05 | 3.12 | 1.25 | NS | - |
| 17 | 3.55 | 2.50 | 1.42 | NS | - |
| 18 | 5.11 | 4.75 | 0.58 | NS | - |
| 19 | 4.50 | 3.94 | 0.75 | NS | - |
| 20 | 6.16 | 6.50 | -1.35 | NS | - |
| <u>AVERAGE
SCORE</u> | 4.51 | 3.90 | 1.53 | NS | - |

APPENDIX G: 9

'ETHNIC' & 'WHITE' AD COMPARISONS: 't' VALUES AND
SIGNIFICANCE LEVELS FOR THE WHITE GROUP

| <u>ITEM NO.</u> | <u>'WHITE' AD</u>
<u>MEAN</u>
<u>(N=18)</u> | <u>'ETHNIC' AD</u>
<u>MEAN</u>
<u>(N=11)</u> | <u>'t' VALUE</u> | <u>SIG.</u>
<u>LEVEL</u> | <u>DIRECTION</u> |
|--------------------------------|---|--|------------------|-----------------------------|------------------|
| 1 | 5.50 | 6.54 | -1.62 | NS | - |
| 2 | 5.00 | 5.27 | -0.33 | NS | - |
| 3 | 5.27 | 5.09 | 0.23 | NS | - |
| 4 | 4.28 | 4.36 | -0.12 | NS | - |
| 5 | 4.39 | 5.63 | -1.98 | .10 | 'ETHNIC' AD |
| 6 | 5.27 | 6.45 | -2.30 | .05 | 'ETHNIC' AD |
| 7 | 3.33 | 3.09 | 0.26 | NS | - |
| 8 | 4.39 | 3.90 | 0.68 | NS | - |
| 9 | 4.00 | 4.18 | -0.24 | NS | - |
| 10 | 4.11 | 4.45 | -0.42 | NS | - |
| 11 | 4.38 | 5.18 | -0.96 | NS | - |
| 12 | 4.66 | 5.27 | -0.82 | NS | - |
| 13 | 3.28 | 4.54 | -1.53 | NS | - |
| 14 | 4.33 | 2.00 | 3.38 | .01 | 'WHITE' AD |
| 15 | 4.67 | 5.27 | -0.69 | NS | - |
| 16 | 4.05 | 2.09 | 2.78 | .01 | 'WHITE' AD |
| 17 | 3.55 | 3.09 | 0.54 | NS | - |
| 18 | 5.11 | 5.54 | -0.67 | NS | - |
| 19 | 4.50 | 5.63 | -1.51 | NS | - |
| 20 | 6.17 | 7.00 | -3.49 | .01 | 'ETHNIC' AD |
| <u>AVERAGE</u>
<u>SCORE</u> | 4.51 | 4.73 | -0.48 | NS | - |

APPENDIX G:10
~~~~~

'CAR-ONLY' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND  
~~~~~  
SIGNIFICANCE LEVELS FOR THE WHITE GROUP
~~~~~

ITEM NO.	'WHITE' AD MEAN (N=18)	'CAR-ONLY' AD MEAN (N=15)	't' VALUE	SIG. LEVEL	DIRECTION
1	5.50	6.27	-1.31	NS	-
2	5.00	6.00	-1.60	NS	-
3	5.28	6.13	-1.45	NS	-
4	4.28	4.07	0.36	NS	-
5	4.39	4.67	-0.55	NS	-
6	5.28	5.20	0.14	NS	-
7	3.33	4.73	-1.61	NS	-
8	4.39	5.06	-1.21	NS	-
9	4.00	5.06	-1.71	.10	'CAR' AD
10	4.11	4.60	-0.66	NS	-
11	4.39	5.40	-1.46	NS	-
12	4.67	5.33	-1.05	NS	-
13	3.28	3.80	-0.74	NS	-
14	4.33	4.33	0.00	NS	-
15	4.67	4.60	0.08	NS	-
16	4.05	5.00	-1.28	NS	-
17	3.55	4.27	-0.87	NS	-
18	5.11	5.26	-0.26	NS	-
19	4.50	5.33	-1.36	NS	-
20	6.16	3.46	9.56	.001	'WHITE' AD
<u>AVERAGE SCORE</u>	4.51	4.93	-1.04	NS	-

APPENDIX G:11

'INTEGRATED' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND  
SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC GROUP

ITEM NO.	'WHITE' AD MEAN (N=50)	'INTEGRATED' AD MEAN (N=50)	't' VALUE	SIG. LEVEL	DIRECTION
1	6.02	6.20	-0.82	NS	-
2	6.08	6.06	0.09	NS	-
3	5.60	5.94	-1.46	NS	-
4	5.38	5.70	-1.26	NS	-
5	5.68	5.74	-0.28	NS	-
6	5.96	6.14	-0.87	NS	-
7	3.98	4.68	-2.03	.05	'INTEGRATED' AD
8	4.74	5.56	-3.11	.01	'INTEGRATED' AD
9	5.70	5.44	0.96	NS	-
10	5.34	5.44	-0.40	NS	-
11	5.64	5.42	0.76	NS	-
12	5.28	5.46	-0.60	NS	-
13	4.04	4.80	-2.08	.05	'INTEGRATED' AD
14	5.36	5.04	0.98	NS	-
15	5.10	5.26	-0.54	NS	-
16	5.14	3.96	3.77	.001	'WHITE' AD
17	4.82	5.14	-1.00	.001	'INTEGRATED' AD
18	6.16	6.12	0.18	NS	-
19	5.86	6.16	-1.56	NS	-
20	6.28	5.98	1.51	NS	-
AVERAGE SCORE	5.41	5.51	-0.73	NS	-



APPENDIX G:12  
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'ETHNIC' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES AND
~~~~~  
SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC GROUP  
~~~~~

| ITEM NO. | 'WHITE' AD
MEAN
(N=50) | 'ETHNIC' AD
MEAN
(N=50) | 't' VALUE | SIG.
LEVEL | DIRECTION |
|--------------------------|------------------------------|-------------------------------|-----------|---------------|-------------|
| 1 | 6.02 | 6.42 | -1.90 | .10 | 'ETHNIC' AD |
| 2 | 6.08 | 6.10 | -0.10 | NS | - |
| 3 | 5.60 | 5.78 | -0.75 | NS | - |
| 4 | 5.38 | 5.98 | -2.37 | .05 | 'ETHNIC' AD |
| 5 | 5.68 | 6.14 | -2.14 | .05 | 'ETHNIC' AD |
| 6 | 5.96 | 6.16 | -0.95 | NS | - |
| 7 | 3.98 | 5.40 | -4.67 | .001 | 'ETHNIC' AD |
| 8 | 4.74 | 6.10 | -5.65 | .001 | 'ETHNIC' AD |
| 9 | 5.70 | 6.30 | -2.56 | .01 | 'ETHNIC' AD |
| 10 | 5.34 | 5.92 | -2.31 | .05 | 'ETHNIC' AD |
| 11 | 5.64 | 5.98 | -1.26 | NS | - |
| 12 | 5.28 | 5.62 | -1.31 | NS | - |
| 13 | 4.04 | 4.74 | -1.75 | .10 | 'ETHNIC' AD |
| 14 | 5.36 | 5.78 | -1.26 | NS | - |
| 15 | 5.10 | 6.18 | -3.82 | .001 | 'ETHNIC' AD |
| 16 | 5.14 | 5.58 | -1.56 | NS | - |
| 17 | 4.82 | 5.46 | -1.99 | .05 | 'ETHNIC' AD |
| 18 | 6.16 | 6.22 | -0.29 | NS | - |
| 19 | 5.86 | 6.44 | -3.33 | .001 | 'ETHNIC' AD |
| 20 | 6.28 | 5.91 | 2.00 | .05 | 'WHITE' AD |
| <u>AVERAGE
SCORE</u> | 5.40 | 5.91 | -3.52 | .001 | 'ETHNIC' AD |

APPENDIX G:13
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'CAR-ONLY' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES  
~~~~~  
AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC GROUP
~~~~~

ITEM NO.	'WHITE' AD MEAN (N=50)	'CAR-ONLY' AD MEAN (N=50)	't' VALUE	SIG. LEVEL	DIRECTION
1	6.02	6.08	-0.27	NS	-
2	6.08	6.08	0.00	NS	-
3	5.60	6.20	-2.73	.01	'CAR' AD
4	5.38	5.86	-1.93	.10	'CAR' AD
5	5.68	5.40	1.25	NS	-
6	5.96	5.52	2.02	.05	'WHITE' AD
7	3.98	5.18	-3.63	.001	'CAR' AD
8	4.74	5.70	-3.64	.001	'CAR' AD
9	5.70	5.70	0.00	NS	-
10	5.34	5.60	-0.95	NS	-
11	5.64	5.98	-1.19	NS	-
12	5.28	5.94	-2.64	.01	'CAR' AD
13	4.04	5.66	-4.82	.001	'CAR' AD
14	5.36	6.04	-2.42	.05	'CAR' AD
15	5.10	5.64	-1.87	.10	'CAR' AD
16	5.14	5.56	-1.47	NS	-
17	4.82	5.34	-1.70	.10	'CAR' AD
18	6.16	6.24	-0.35	NS	-
19	5.86	6.24	-1.78	.10	'CAR' AD
20	6.28	3.76	15.69	.001	'WHITE' AD
<u>AVERAGE SCORE</u>	5.41	5.68	-2.00	.05	'CAR' AD

APPENDIX G:14

'CAR-ONLY' & 'WHITE' AD CONCEPT COMPARISONS: 't' VALUES  
AND SIGNIFICANCE LEVELS FOR THE WEST INDIAN ETHNIC GROUP

ITEM NO.	'WHITE' AD MEAN (N=11)	'CAR-ONLY' AD MEAN (N=10)	't' VALUE	SIG. LEVEL	DIRECTION
1	6.00	5.40	1.16	NS	-
2	5.63	5.30	0.81	NS	-
3	3.91	6.90	-5.73	.001	'CAR-ONLY' AD
4	3.18	3.70	-0.93	NS	-
5	5.09	5.20	-0.19	NS	-
6	6.00	6.60	-1.25	NS	-
7	2.45	2.50	-0.06	NS	-
8	3.91	4.10	-0.33	NS	-
9	4.36	4.90	-0.69	NS	-
10	4.27	4.60	-0.46	NS	-
11	4.27	6.30	-3.29	.01	'CAR-ONLY' AD
12	5.09	4.20	1.30	NS	-
13	4.36	5.80	-1.89	.10	'CAR-ONLY' AD
14	2.72	6.10	-3.96	.001	'CAR-ONLY' AD
15	3.45	2.70	0.80	NS	-
16	5.27	4.20	1.49	NS	-
17	3.27	3.10	0.21	NS	-
18	4.54	5.70	-1.76	.10	'CAR-ONLY' AD
19	4.18	5.40	-2.01	.10	'CAR-ONLY' AD
20	5.81	2.50	6.42	.001	'WHITE' AD
AVERAGE SCORE	4.39	4.76	-1.25	NS	-

APPENDIX H  
~~~~~

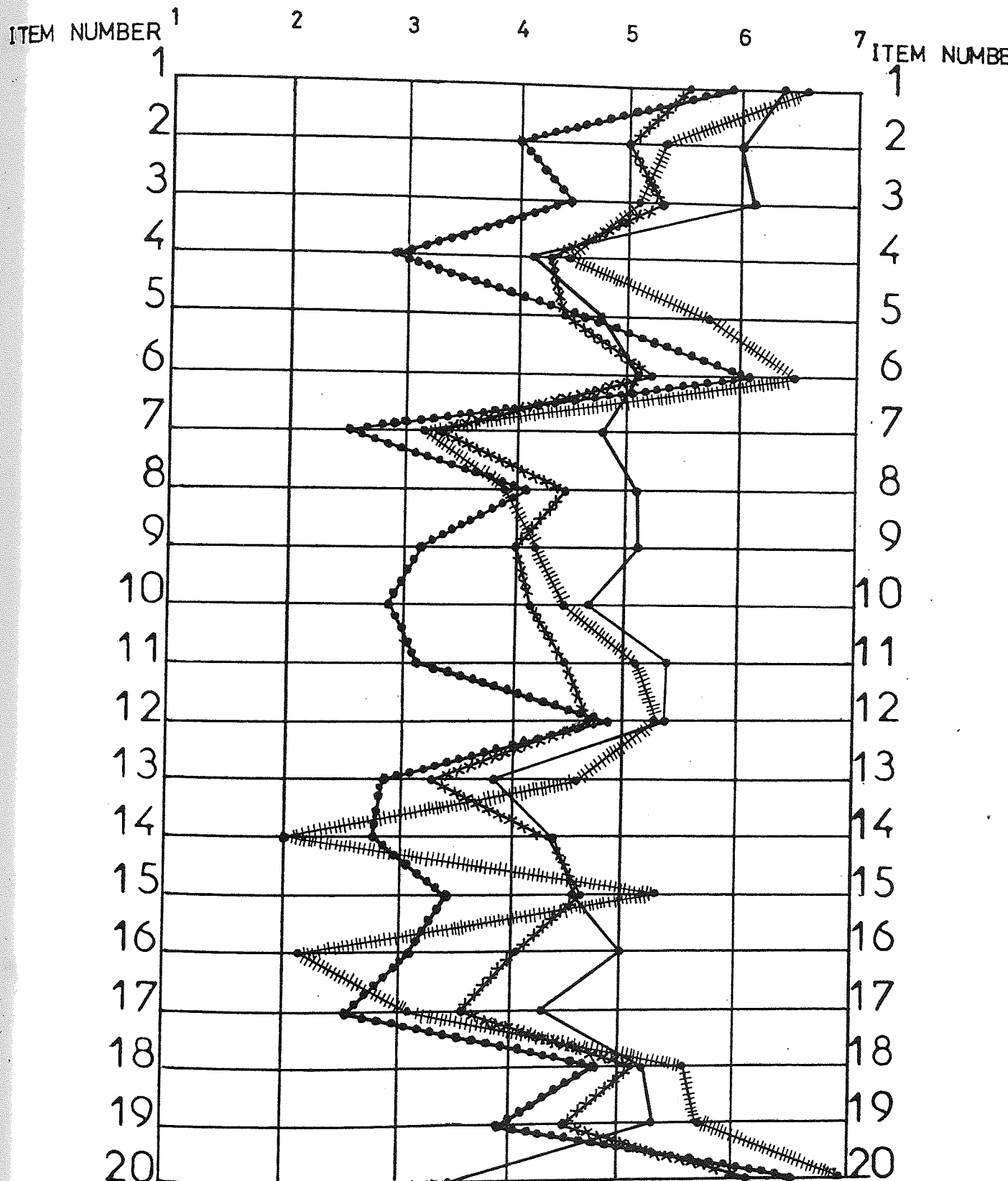
APPENDIX H

SEMANTIC DIFFERENTIAL PROFILES ON AD CONCEPTS

This section displays the profiles for the ad-layouts at different levels of integration, for the Asian and West Indian ethnic and white groups. These were drawn on the basis of the semantic differential data in the previous section. In order, these are:-

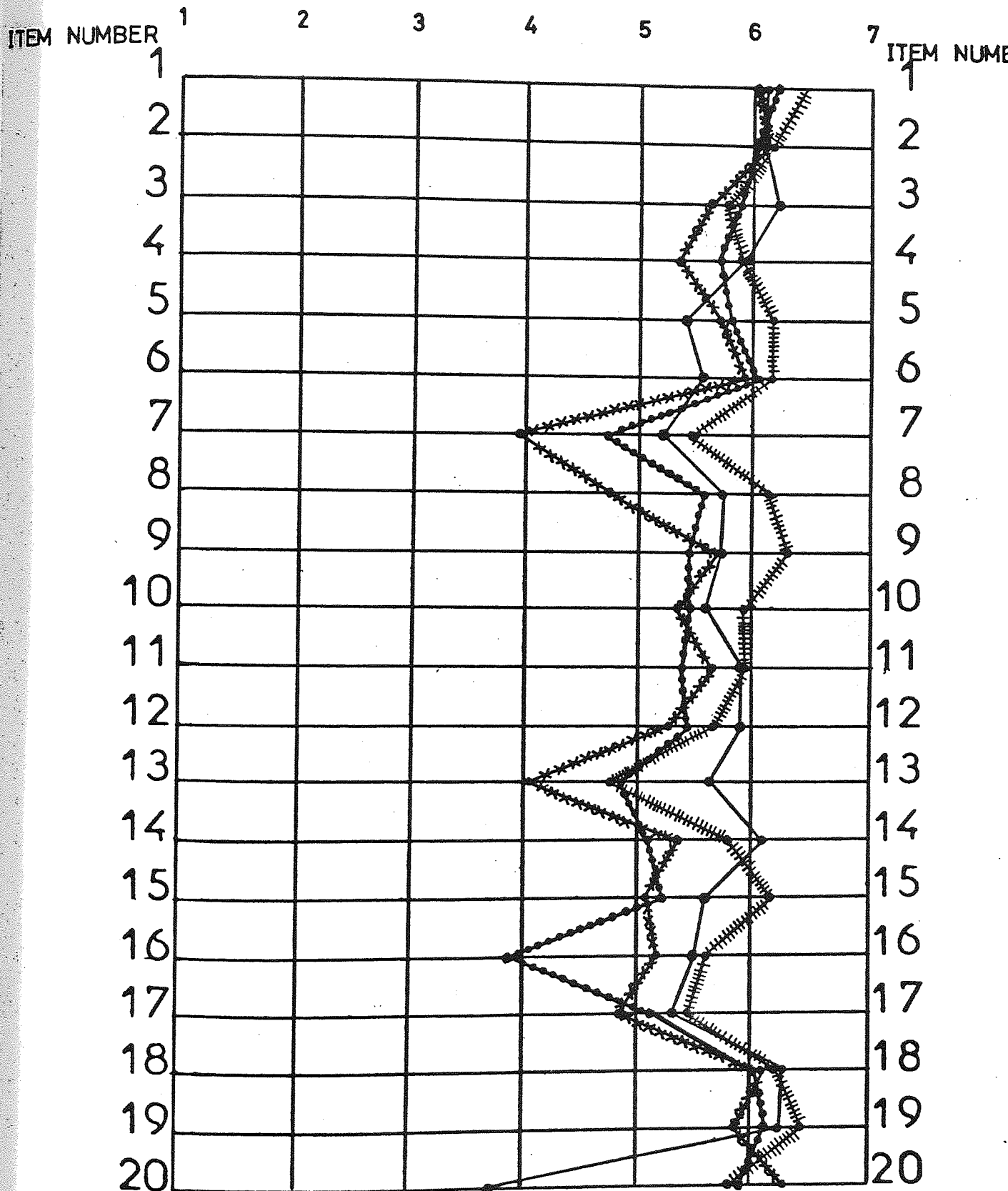
- | | |
|---------------|--|
| APPENDIX H: 1 | SEMANTIC DIFFERENTIAL AD PROFILES FOR THE WHITE GROUP |
| APPENDIX H: 2 | SEMANTIC DIFFERENTIAL AD PROFILES FOR THE ASIAN ETHNIC GROUP |
| APPENDIX H: 3 | SEMANTIC DIFFERENTIAL AD PROFILES FOR THE WEST INDIAN ETHNIC GROUP |
| APPENDIX H: 4 | SEMANTIC DIFFERENTIAL PROFILES FOR THE 'WHITE' AD |
| APPENDIX H: 5 | SEMANTIC DIFFERENTIAL PROFILES FOR THE 'INTEGRATED' AD |
| APPENDIX H: 6 | SEMANTIC DIFFERENTIAL PROFILES FOR THE 'ETHNIC' AD |
| APPENDIX H: 7 | SEMANTIC DIFFERENTIAL PROFILES FOR THE 'CAR-ONLY' AD |





SEMANTIC DIFFERENTIAL AD PROFILES FOR THE WHITE GROUP
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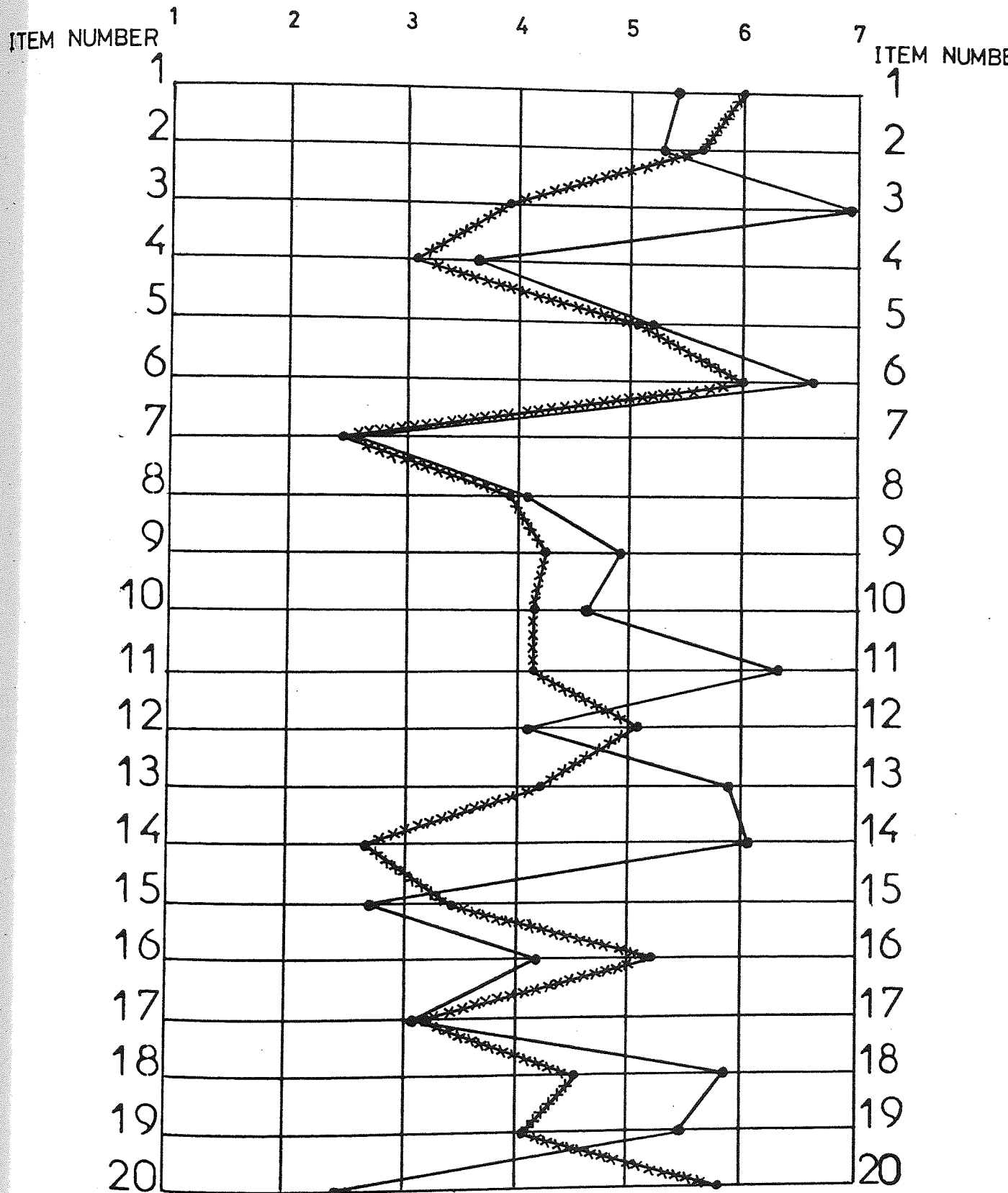
KEY: 'WHITE' AD      xxxx  
 'INTEGRATED' AD    .....  
 'ETHNIC' AD        |||||  
 'CAR ONLY' AD      ———

# APPENDIX II: 2 SEMANTIC DIFFERENTIAL AD PROFILES FOR THE ASIAN ETHNIC GROUP ~~~~~



KEY: 'WHITE' AD   
'INTEGRATED' AD   
'ETHNIC' AD   
'CAR ONLY' AD 

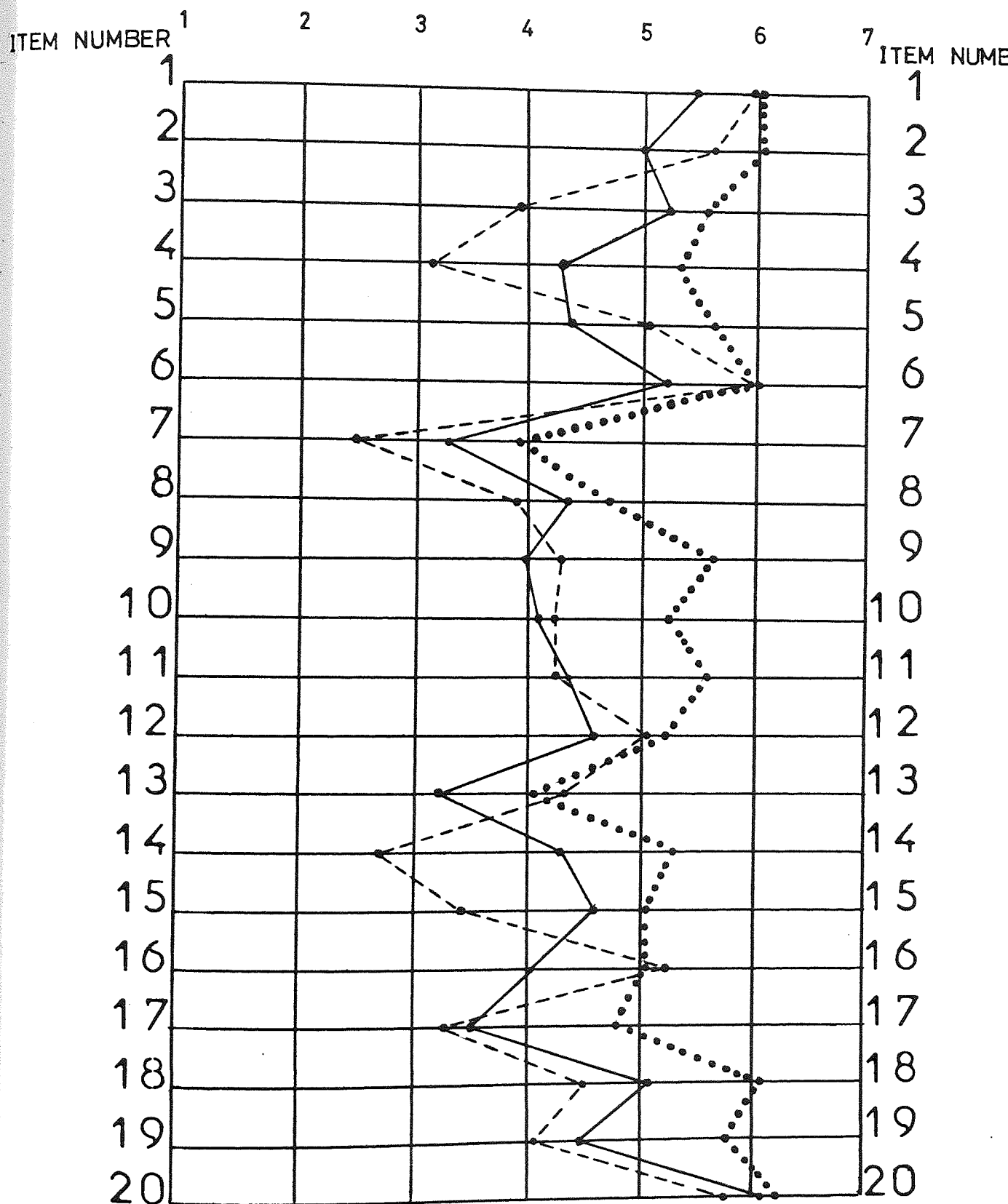
SEMANTIC DIFFERENTIAL AD PROFILES FOR THE WEST INDIAN ETHNIC  
GROUP



KEY: 'WHITE' AD \*\*\*\*\*  
'CAR ONLY' AD —

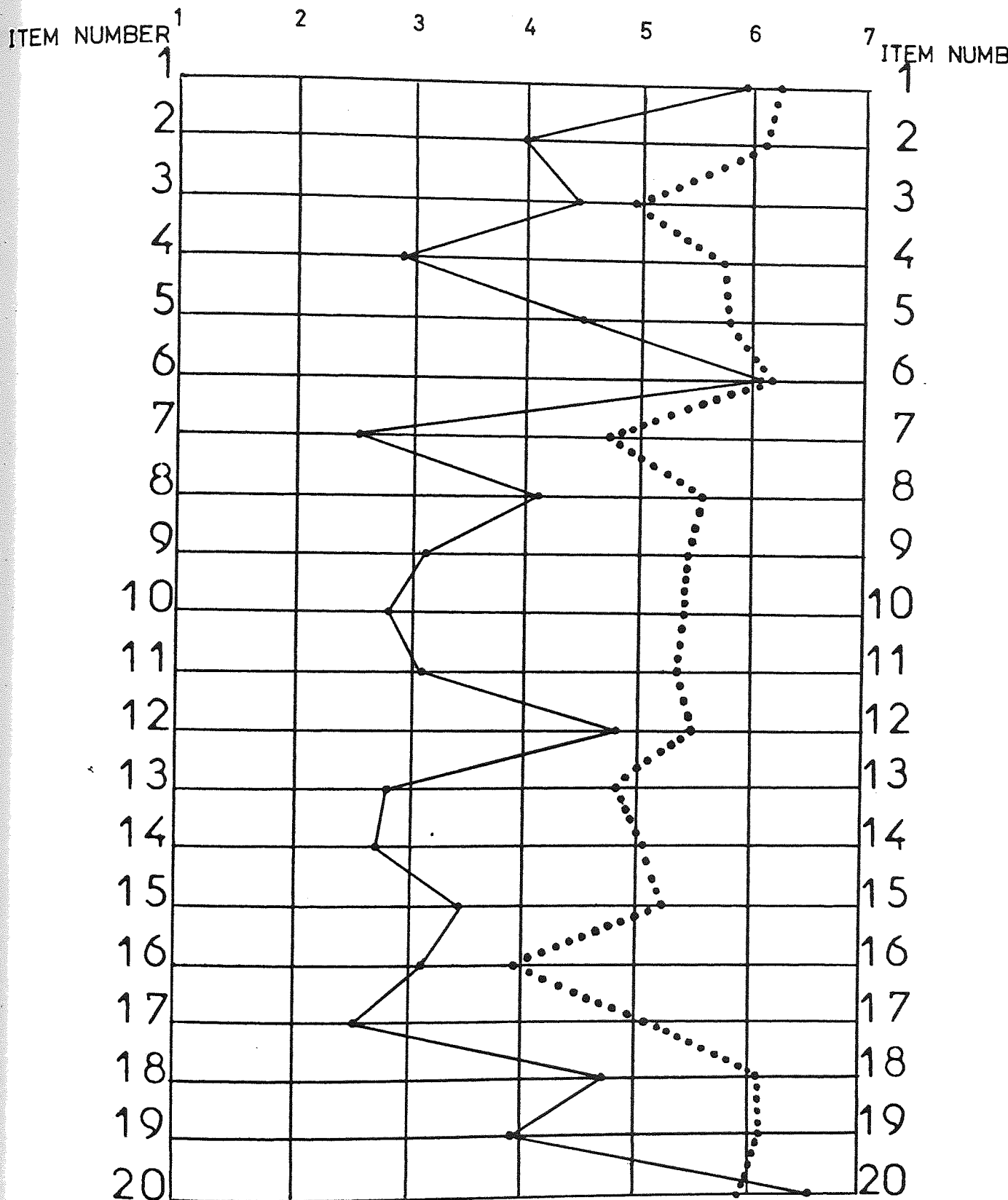


SEMANTIC DIFFERENTIAL PROFILES FOR THE 'WHITE' AD  
~~~~~



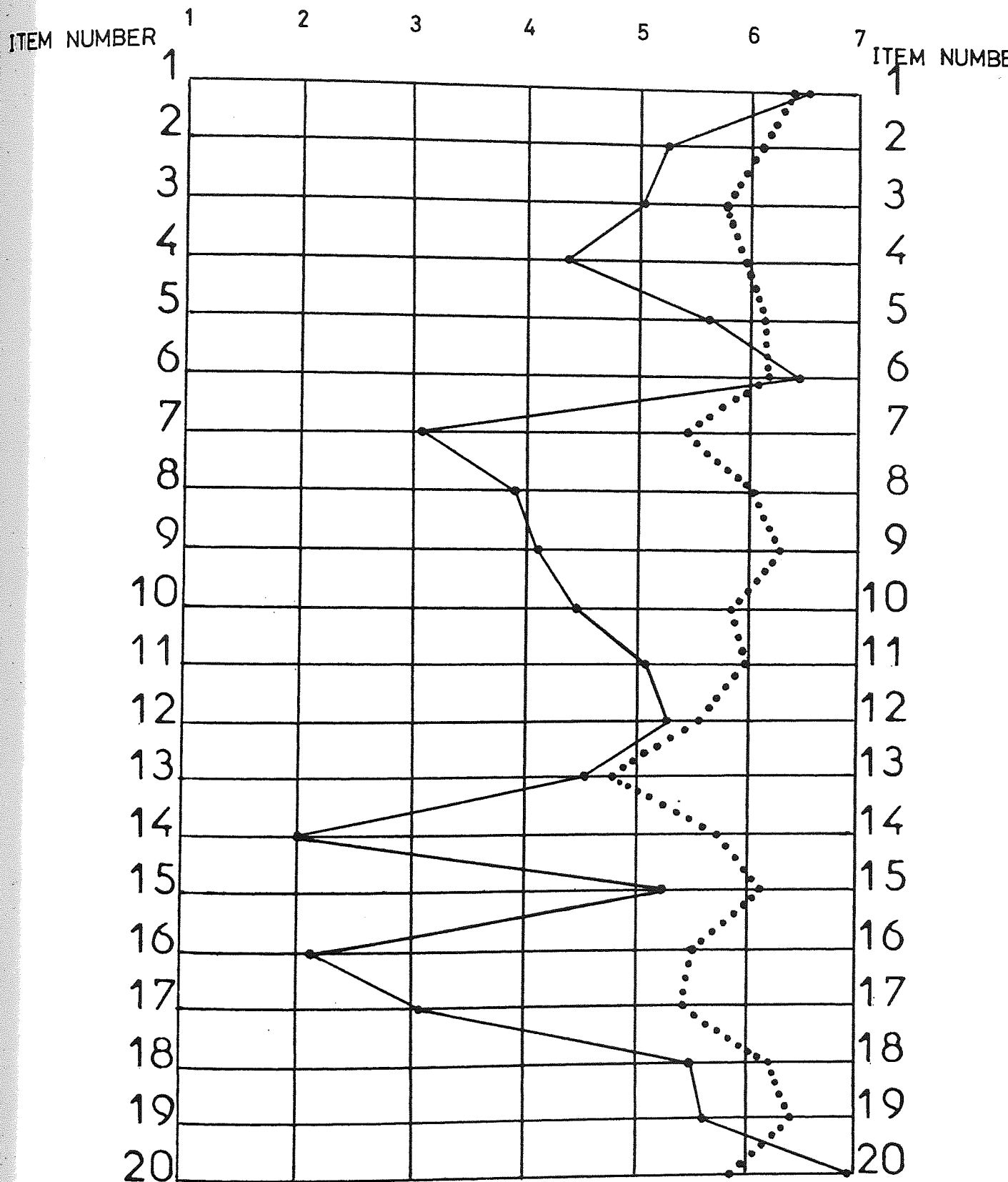
KEY: WHITE ———
ASIAN ETHNIC
WEST INDIAN ETHNIC - - - -

SEMANTIC DIFFERENTIAL PROFILES FOR THE 'INTEGRATED' AD
~~~~~



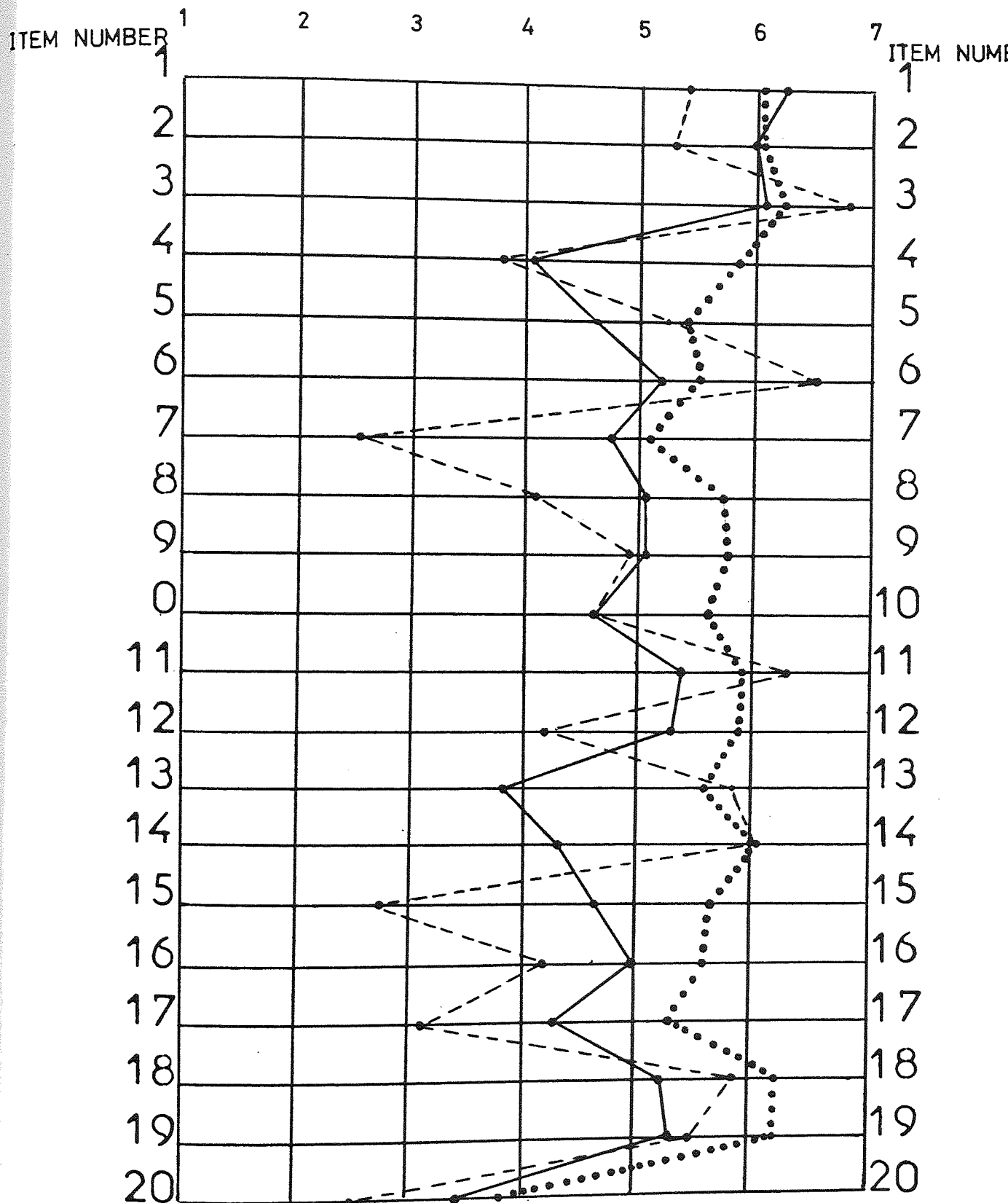
KEY: WHITE —  
ASIAN ETHNIC .....

SEMANTIC DIFFERENTIAL PROFILES FOR THE 'ETHNIC' AD  
~~~~~



KEY: WHITE —
ASIAN ETHNIC

SEMANTIC DIFFERENTIAL PROFILES FOR THE 'CAR-ONLY' AD
~~~~~



KEY: WHITE ———  
ASIAN ETHNIC .....  
WEST INDIAN ETHNIC - - -

APPENDIX I  
~~~~~

APPENDIX I
~~~~~

SEMANTIC DIFFERENTIAL DATA ON 'REAL' & 'IDEAL' STORE CONCEPTS  
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This section contains the data on store concepts relating to 'real' and 'ideal' store images, as envisaged by the ethnic and white groups. In order, the following analyses were covered:-

- APPENDIX I: 1 SEMANTIC DIFFERENTIAL FORMAT FOR 'REAL' & 'IDEAL' STORE IMAGES
- APPENDIX I: 2 'REAL' STORE DIMENSION COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS
- APPENDIX I: 3 'REAL' STORE CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC GROUP
- APPENDIX I: 4 'REAL' STORE CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WEST INDIAN ETHNIC GROUP
- APPENDIX I: 5 'REAL' & 'IDEAL' STORE DIMENSION COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS
- APPENDIX I: 6 'REAL' & 'IDEAL' STORE CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WHITE GROUP
- APPENDIX I: 7 'REAL' & 'IDEAL' STORE CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC GROUP

SEMANTIC DIFFERENTIAL FORMAT FOR 'REAL' & 'IDEAL' STORE IMAGES

| <u>ITEM NUMBER</u> | <u>STORE ATTRIBUTE</u> |
|----------------------|-------------------------------------|
| <u>DIMENSION I</u> | <u>PHYSICAL ATTRIBUTES OF STORE</u> |
| 1 | Store Cleanliness |
| 2 | Attractiveness of decor |
| 3 | Store Lighting |
| 4 | Ease of finding items |
| 5 | Product Display |
| 6 | Merchandise Spacing |
| 7 | Product Layout |
| 8 | Neatness |
| 9 | Ease of moving |
| 10 | Pleasantness |
| 11 | Speed of Checkout |
| <u>DIMENSION II</u> | <u>CONVENIENCE OF LOCATION</u> |
| 12 | Nearness of location |
| 13 | Time required to reach store |
| 14 | Ease of Driving |
| 15 | Ease of parking |
| 16 | Convenience to other stores |
| <u>DIMENSION III</u> | <u>STORE PRICING</u> |
| 17 | Low prices charged |
| 18 | Value for products |
| 19 | Special prices |
| <u>DIMENSION IV</u> | <u>PRODUCT DEPENDABILITY</u> |
| 20 | Dependability of products |
| 21 | Quality of products |
| 22 | Brands |
| 23 | Product buys |
| <u>DIMENSION V</u> | <u>MERCHANDISE SELECTION</u> |
| 24 | Variety of Product selection |
| 25 | Number of brands |
| 26 | Stock Turnover |
| <u>DIMENSION VI</u> | <u>STORE PERSONNEL</u> |
| 27 | Courtesy of personnel |
| 28 | Friendliness of personnel |
| 29 | Helpfulness of personnel |
| 30 | Number of personnel |
| <u>DIMENSION VII</u> | <u>PATRONAGE BY FRIENDS</u> |
| 31 | Known to Friends |
| 32 | Disliked by Friends |
| 33 | Recommended by Friends |
| 34 | Patronised by Friends |

* SCORES RANGED FROM '1' TO '7'. THE HIGHER THE SCORE, THE MORE POSITIVE THE RATING.

APPENDIX I: 2

'REAL' STORE CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR STORE DIMENSIONS

THE ASIAN ETHNIC GROUP

| <u>DIMENSION</u> | <u>WHITE
MEAN</u> | <u>ASIAN ETHNIC
MEAN</u> | <u>'t' VALUE</u> | <u>SIG.
LEVEL</u> | <u>DIRECTION</u> |
|------------------|-----------------------|------------------------------|------------------|-----------------------|------------------|
| DIMENSION I | 63.62 | 51.15 | 4.60 | .001 | WHITE |
| DIMENSION II | 29.12 | 25.23 | 3.54 | .001 | WHITE |
| DIMENSION III | 14.68 | 13.61 | 1.37 | NS | - |
| DIMENSION IV | 23.75 | 18.94 | 4.24 | .001 | WHITE |
| DIMENSION V | 17.87 | 15.69 | 2.93 | .01 | WHITE |
| DIMENSION VI | 23.12 | 20.00 | 3.20 | .01 | WHITE |
| DIMENSION VII | 23.43 | 17.46 | 5.27 | .001 | WHITE |

THE WEST INDIAN ETHNIC GROUP

| <u>DIMENSION</u> | <u>WHITE
MEAN</u> | <u>WEST INDIAN
MEAN</u> | <u>'t' VALUE</u> | <u>SIG.
LEVEL</u> | <u>DIRECTION</u> |
|------------------|-----------------------|-----------------------------|------------------|-----------------------|------------------|
| DIMENSION I | 63.62 | 64.50 | 0.80 | NS | - |
| DIMENSION II | 29.12 | 28.00 | -0.25 | NS | - |
| DIMENSION III | 14.69 | 15.10 | -0.26 | NS | - |
| DIMENSION IV | 23.75 | 24.00 | -0.17 | NS | - |
| DIMENSION V | 17.87 | 17.00 | 0.78 | NS | - |
| DIMENSION VI | 23.12 | 23.70 | -0.46 | NS | - |
| DIMENSION VII | 23.44 | 16.10 | 5.35 | .001 | WHITE |

* THE HIGHER THE TOTAL SCORE, THE MORE POSITIVELY RATED THE DIMENSION

'REAL' STORE CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC GROUP

| <u>ITEM NO.</u> | <u>WHITE</u>
<u>MEAN</u>
<u>(N=16)</u> | <u>ASIAN ETHNIC</u>
<u>MEAN</u>
<u>(N=39)</u> | <u>'t' VALUE</u> | <u>SIG.</u>
<u>LEVEL</u> | <u>DIRECTION</u> |
|----------------------|--|---|------------------|-----------------------------|------------------|
| <u>DIMENSION I</u> | | | | | |
| 1 | 6.56 | 5.41 | 4.63 | NS | - |
| 2 | 5.18 | 3.38 | 3.96 | NS | - |
| 3 | 5.93 | 4.74 | 3.21 | NS | - |
| 4 | 5.25 | 4.02 | 2.40 | .05 | WHITE |
| 5 | 5.43 | 4.84 | 1.46 | NS | - |
| 6 | 5.50 | 4.66 | 2.09 | .05 | WHITE |
| 7 | 5.62 | 5.00 | 1.82 | .10 | WHITE |
| 8 | 6.00 | 4.87 | 3.01 | NS | - |
| 9 | 6.25 | 4.97 | 3.77 | NS | - |
| 10 | 6.56 | 6.61 | 0.19 | NS | - |
| 11 | 5.31 | 4.61 | 1.37 | NS | - |
| <u>DIMENSION II</u> | | | | | |
| 12 | 5.68 | 5.71 | -0.07 | NS | - |
| 13 | 6.50 | 5.82 | 3.08 | NS | - |
| 14 | 5.75 | 5.02 | 1.71 | .10 | WHITE |
| 15 | 5.12 | 4.28 | 1.43 | NS | - |
| 16 | 6.06 | 4.38 | 3.59 | NS | - |
| <u>DIMENSION III</u> | | | | | |
| 17 | 5.56 | 5.17 | 0.83 | NS | - |
| 18 | 5.50 | 3.66 | 4.67 | NS | - |
| 19 | 3.62 | 4.76 | -2.11 | .05 | ASIAN |
| <u>DIMENSION IV</u> | | | | | |
| 20 | 5.87 | 5.10 | 2.01 | .05 | WHITE |
| 21 | 6.00 | 4.87 | 3.31 | NS | - |
| 22 | 5.87 | 3.74 | 4.95 | NS | - |
| 23 | 6.00 | 5.23 | 2.33 | .05 | WHITE |
| <u>DIMENSION V</u> | | | | | |
| 24 | 6.25 | 5.43 | 2.40 | .05 | WHITE |
| 25 | 5.56 | 5.02 | 1.33 | NS | - |
| 26 | 6.06 | 5.23 | 2.49 | .05 | WHITE |
| <u>DIMENSION VI</u> | | | | | |
| 27 | 6.18 | 5.51 | 2.26 | .05 | WHITE |
| 28 | 5.62 | 5.17 | 0.86 | NS | - |
| 29 | 6.31 | 4.25 | 5.71 | NS | - |
| 30 | 5.00 | 5.05 | -0.10 | NS | - |
| <u>DIMENSION VII</u> | | | | | |
| 31 | 6.25 | 3.76 | 6.02 | NS | - |
| 32 | 6.06 | 5.07 | 2.76 | NS | - |
| 33 | 5.81 | 3.82 | 4.85 | NS | - |
| 34 | 5.31 | 4.79 | 1.13 | NS | - |
| <u>STORE</u> | | | | | |
| <u>SATISFACTION</u> | 5.45 | 6.00 | -1.37 | NS | - |

APPENDIX I: 4

'REAL' STORE CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WEST INDIAN ETHNIC GROUP

| <u>ITEM NO.</u> | <u>WHITE
MEAN
(N=16)</u> | <u>WEST INDIAN
MEAN
(N=10)</u> | <u>'t' VALUE</u> | <u>SIG.
LEVEL</u> | <u>DIRECTION</u> |
|-------------------------------|----------------------------------|--|------------------|-----------------------|------------------|
| <u>DIMENSION I</u> | | | | | |
| 1 | 6.56 | 6.50 | 0.19 | NS | - |
| 2 | 5.18 | 5.80 | -1.01 | NS | - |
| 3 | 5.94 | 5.70 | 0.44 | NS | - |
| 4 | 5.25 | 5.50 | -0.35 | NS | - |
| 5 | 5.44 | 5.60 | -0.30 | NS | - |
| 6 | 5.50 | 6.30 | -1.77 | .10 | WEST INDIAN |
| 7 | 5.62 | 6.50 | -2.36 | .05 | WEST INDIAN |
| 8 | 6.00 | 6.30 | -0.70 | NS | - |
| 9 | 6.25 | 6.00 | 0.61 | NS | - |
| 10 | 6.56 | 6.00 | 1.71 | .10 | WHITE |
| 11 | 5.31 | 4.30 | 1.25 | NS | - |
| <u>DIMENSION II</u> | | | | | |
| 12 | 5.69 | 6.50 | -1.41 | NS | - |
| 13 | 6.50 | 6.70 | -1.41 | NS | - |
| 14 | 5.75 | 5.30 | 0.78 | NS | - |
| 15 | 5.12 | 3.30 | 2.24 | .05 | WHITE |
| 16 | 6.06 | 6.20 | -0.22 | NS | - |
| <u>DIMENSION III</u> | | | | | |
| 17 | 5.56 | 4.80 | 1.01 | NS | - |
| 18 | 5.50 | 5.40 | 0.20 | NS | - |
| 19 | 3.62 | 4.90 | -1.55 | NS | - |
| <u>DIMENSION IV</u> | | | | | |
| 20 | 5.87 | 6.40 | -1.26 | NS | - |
| 21 | 6.00 | 5.80 | 0.41 | NS | - |
| 22 | 5.81 | 5.70 | 0.10 | NS | - |
| 23 | 6.00 | 5.40 | 0.20 | NS | - |
| <u>DIMENSION V</u> | | | | | |
| 24 | 6.25 | 5.90 | 0.80 | NS | - |
| 25 | 5.56 | 5.10 | 0.77 | NS | - |
| 26 | 6.06 | 6.00 | 0.12 | NS | - |
| <u>DIMENSION VI</u> | | | | | |
| 27 | 6.19 | 6.20 | -0.04 | NS | - |
| 28 | 5.62 | 6.00 | -0.70 | NS | - |
| 29 | 6.31 | 5.70 | 1.44 | NS | - |
| 30 | 5.00 | 5.80 | -1.29 | NS | - |
| <u>DIMENSION VII</u> | | | | | |
| 31 | 6.25 | 4.60 | 4.51 | .001 | WHITE |
| 32 | 6.06 | 4.30 | 5.17 | .001 | WHITE |
| 33 | 5.81 | 3.60 | 4.39 | .001 | WHITE |
| 34 | 5.31 | 3.60 | 3.09 | .01 | WHITE |
| <u>STORE
SATISFACTION</u> | 5.45 | 6.00 | -1.37 | NS | - |

APPENDIX I: 5
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COMPARISON OF 'REAL' & 'IDEAL' STORE CONCEPT DIMENSIONS:  
~~~~~  
't' VALUES AND SIGNIFICANCE LEVELS
~~~~~

WHITE RESPONSES  
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| <u>DIMENSION</u> | <u>'REAL'</u>
<u>MEAN</u> | <u>'IDEAL'</u>
<u>MEAN</u> | <u>'t' VALUE</u> | <u>SIG.</u>
<u>LEVEL</u> | <u>DIRECTION</u> |
|------------------|------------------------------|-------------------------------|------------------|-----------------------------|------------------|
| DIMENSION I | 63.62 | 72.30 | -3.03 | NS | - |
| DIMENSION II | 29.12 | 34.70 | -4.82 | NS | - |
| DIMENSION III | 14.68 | 17.50 | -2.23 | .05 | 'IDEAL' |
| DIMENSION IV | 23.75 | 24.80 | -0.74 | NS | - |
| DIMENSION V | 17.87 | 17.00 | 0.82 | NS | - |
| DIMENSION VI | 23.12 | 29.60 | -0.37 | NS | - |
| DIMENSION VII | 23.43 | 24.00 | -0.38 | NS | - |

ASIAN ETHNIC RESPONSES
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<u>DIMENSION</u>	<u>'REAL'</u> <u>MEAN</u>	<u>'IDEAL'</u> <u>MEAN</u>	<u>'t' VALUE</u>	<u>SIG.</u> <u>LEVEL</u>	<u>DIRECTION</u>
DIMENSION I	51.15	72.64	-7.55	NS	-
DIMENSION II	25.23	32.86	-6.57	NS	-
DIMENSION III	13.61	18.00	-6.20	NS	-
DIMENSION IV	18.95	25.50	-6.60	NS	-
DIMENSION V	15.69	19.36	-4.70	NS	-
DIMENSION VI	20.00	25.36	-5.00	NS	-
DIMENSION VII	17.46	23.07	-3.93	NS	-

# APPENDIX I: 6

## 'REAL' & 'IDEAL' STORE CONCEPT COMPARISONS: 't' VALUES AND SIGNIFICANCE LEVELS FOR THE WHITE GROUP

<u>ITEM NO.</u>	<u>'REAL'</u> <u>MEAN</u>	<u>'IDEAL'</u> <u>MEAN</u>	<u>'t' VALUE</u>	<u>SIG.</u> <u>LEVEL</u>	<u>DIRECTION</u>
<u>DIMENSION I</u>					
1	6.56	7.00	-2.68	.01	'IDEAL'
2	5.19	6.80	-3.46	NS	-
3	5.94	6.30	-0.85	NS	-
4	5.25	6.90	-3.03	NS	-
5	5.44	6.50	-2.27	.05	'IDEAL'
6	5.50	6.60	-2.71	.01	'IDEAL'
7	5.62	6.60	-2.78	.01	'IDEAL'
8	6.00	6.00	0.00	NS	-
9	6.25	6.80	-1.75	.10	'IDEAL'
10	6.56	6.40	0.46	NS	-
11	5.31	6.40	-1.80	.10	'IDEAL'
<u>DIMENSION II</u>					
12	5.68	7.00	-2.48	.05	'IDEAL'
13	6.50	7.00	-2.15	.05	'IDEAL'
14	5.75	7.00	-2.92	NS	-
15	5.12	7.00	-2.77	.01	'IDEAL'
16	6.06	6.70	-1.21	NS	-
<u>DIMENSION III</u>					
17	6.25	5.80	0.99	NS	-
18	5.87	6.20	-0.66	NS	-
19	6.00	6.00	0.00	NS	-
<u>DIMENSION IV</u>					
20	5.56	4.60	1.44	NS	-
21	5.87	6.10	-1.38	NS	-
22	5.57	6.40	-1.38	NS	-
23	5.50	6.50	-2.28	.05	'IDEAL'
<u>DIMENSION V</u>					
24	3.62	4.60	-1.13	NS	-
25	6.00	6.50	-1.23	NS	-
26	6.06	6.60	-1.35	NS	-
<u>DIMENSION VI</u>					
27	6.19	6.20	-0.04	NS	-
28	5.62	5.70	-0.12	NS	-
29	6.31	5.90	1.11	NS	-
30	5.00	5.80	-1.24	NS	-
<u>DIMENSION VII</u>					
31	6.25	6.10	0.37	NS	-
32	6.06	6.10	-0.09	NS	-
33	5.81	5.90	-0.19	NS	-
34	5.31	5.90	-1.07	NS	-

APPENDIX I: 7  
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'REAL' & 'IDEAL' STORE CONCEPT COMPARISONS: 't' VALUES AND
~~~~~  
SIGNIFICANCE LEVELS FOR THE ASIAN ETHNIC GROUP  
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| <u>ITEM NO.</u> | <u>'REAL'</u>
<u>MEAN</u>
<u>(N=16)</u> | <u>'IDEAL'</u>
<u>MEAN</u>
<u>(N=10)</u> | <u>'t' VALUE</u> | <u>SIG.</u>
<u>LEVEL</u> | <u>DIRECTION</u> |
|----------------------|---|--|------------------|-----------------------------|------------------|
| <u>DIMENSION I</u> | | | | | |
| 1 | 5.41 | 6.42 | -2.70 | .01 | 'IDEAL' |
| 2 | 3.38 | 6.28 | -5.88 | NS | - |
| 3 | 4.74 | 6.57 | -4.55 | NS | - |
| 4 | 4.02 | 6.50 | -5.08 | NS | - |
| 5 | 4.84 | 6.57 | -4.52 | NS | - |
| 6 | 4.66 | 6.64 | -4.44 | NS | - |
| 7 | 5.00 | 6.71 | -4.37 | NS | - |
| 8 | 4.87 | 6.71 | -4.87 | NS | - |
| 9 | 4.97 | 6.85 | -4.53 | NS | - |
| 10 | 6.61 | 6.71 | -5.13 | NS | - |
| 11 | 4.61 | 6.64 | -4.42 | NS | - |
| <u>DIMENSION II</u> | | | | | |
| 12 | 5.71 | 6.50 | -2.45 | .01 | 'IDEAL' |
| 13 | 5.82 | 6.50 | -2.70 | .01 | 'IDEAL' |
| 14 | 5.02 | 6.71 | -3.80 | NS | - |
| 15 | 4.28 | 6.64 | -5.38 | NS | - |
| 16 | 4.38 | 6.50 | -5.15 | NS | - |
| <u>DIMENSION III</u> | | | | | |
| 17 | 5.17 | 6.64 | -3.24 | .001 | 'IDEAL' |
| 18 | 3.66 | 6.71 | -5.81 | NS | - |
| 19 | 4.76 | 6.57 | -5.22 | NS | - |
| <u>DIMENSION IV</u> | | | | | |
| 20 | 5.10 | 6.42 | -3.78 | NS | - |
| 21 | 4.87 | 5.85 | -4.40 | NS | - |
| 22 | 3.74 | 6.35 | -4.12 | NS | - |
| 23 | 5.23 | 6.00 | -5.56 | NS | - |
| <u>DIMENSION V</u> | | | | | |
| 24 | 5.43 | 2.64 | -1.84 | .10 | 'REAL' |
| 25 | 5.02 | 6.36 | -3.00 | NS | - |
| 26 | 5.23 | 6.28 | -3.08 | NS | - |
| <u>DIMENSION VI</u> | | | | | |
| 27 | 5.51 | 6.28 | -2.05 | .05 | 'IDEAL' |
| 28 | 5.18 | 6.07 | -1.88 | .10 | 'IDEAL' |
| 29 | 4.25 | 6.50 | -4.56 | NS | - |
| 30 | 5.05 | 6.50 | -3.64 | NS | - |
| <u>DIMENSION VII</u> | | | | | |
| 31 | 3.77 | 5.86 | -3.52 | NS | - |
| 32 | 5.07 | 5.86 | -1.73 | .10 | 'IDEAL' |
| 33 | 3.82 | 5.57 | -3.48 | NS | - |
| 34 | 4.79 | 5.78 | -2.10 | .05 | 'IDEAL' |

APPENDIX J
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APPENDIX J  
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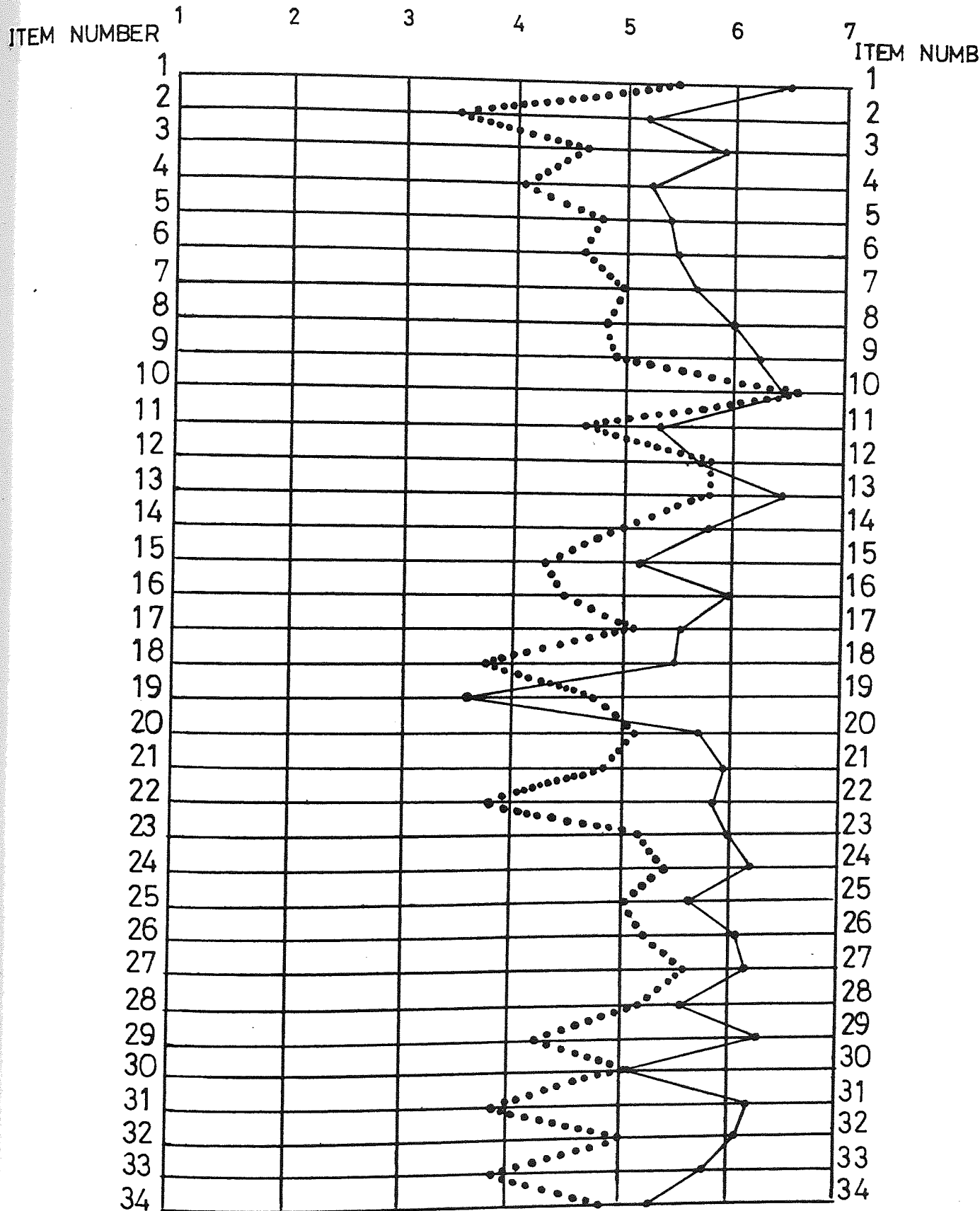
SEMANTIC DIFFERENTIAL PROFILES ON 'REAL' & 'IDEAL' STORE
~~~~~  
CONCEPTS  
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This section includes the semantic differential profiles relating to 'real' and 'ideal' store concepts for the Asian ethnic and white groups. In order these are:-

- APPENDIX J: 1 'REAL' STORE PROFILES FOR THE ASIAN ETHNIC AND WHITE GROUPS
- APPENDIX J: 2 'REAL' STORE PROFILES FOR THE WEST INDIAN ETHNIC AND WHITE GROUPS
- APPENDIX J: 3 'REAL' & 'IDEAL' STORE PROFILES FOR THE WHITE GROUP
- APPENDIX J: 4 'REAL' & 'IDEAL' STORE PROFILES FOR THE ASIAN ETHNIC GROUP

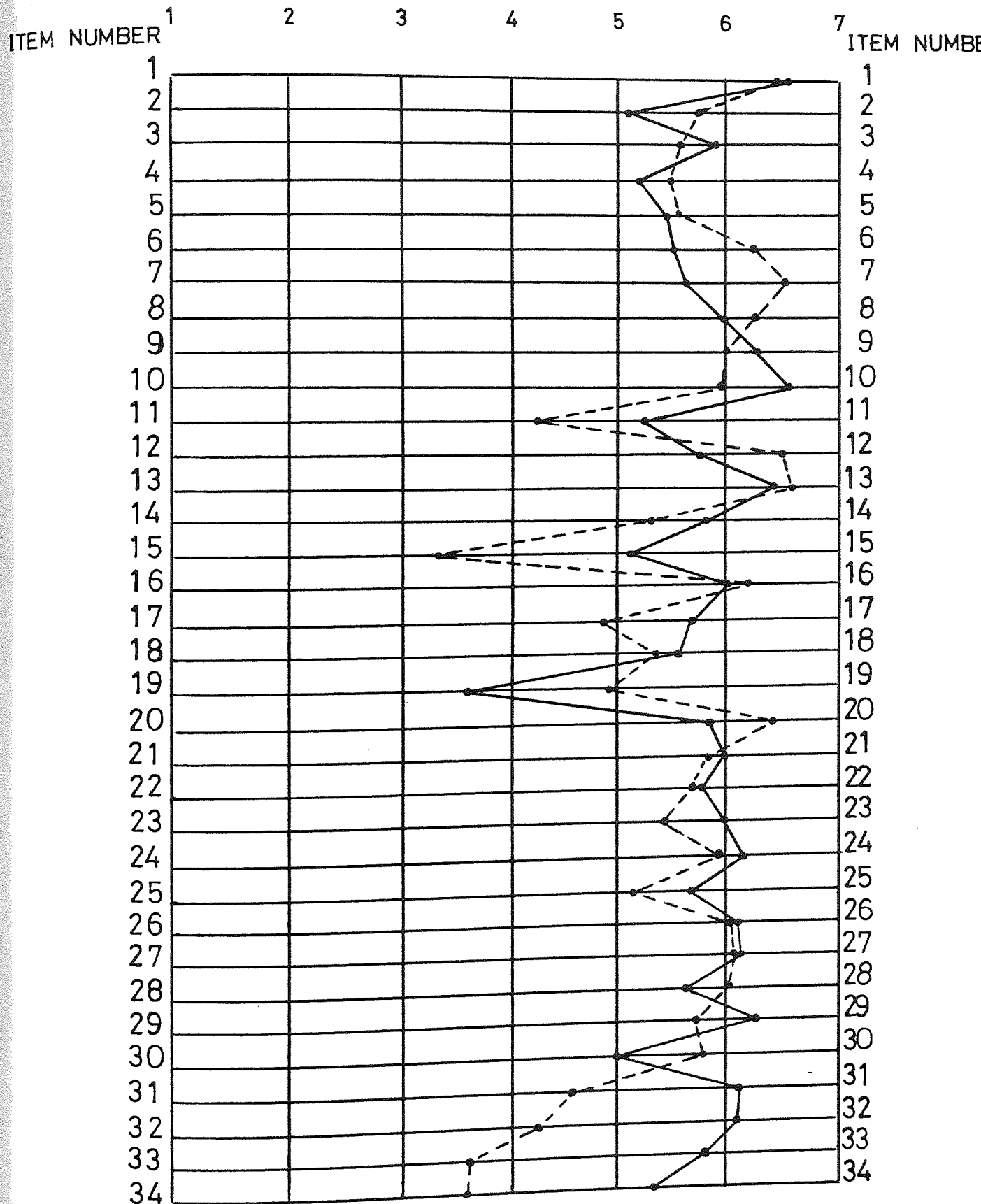
A comparison of the 'real' and 'ideal' store profiles for the West Indian ethnic group was not deemed possible because of the low response rate for the 'ideal' store concept.

'REAL' STORE PROFILES FOR THE ASIAN ETHNIC AND WHITE GROUPS
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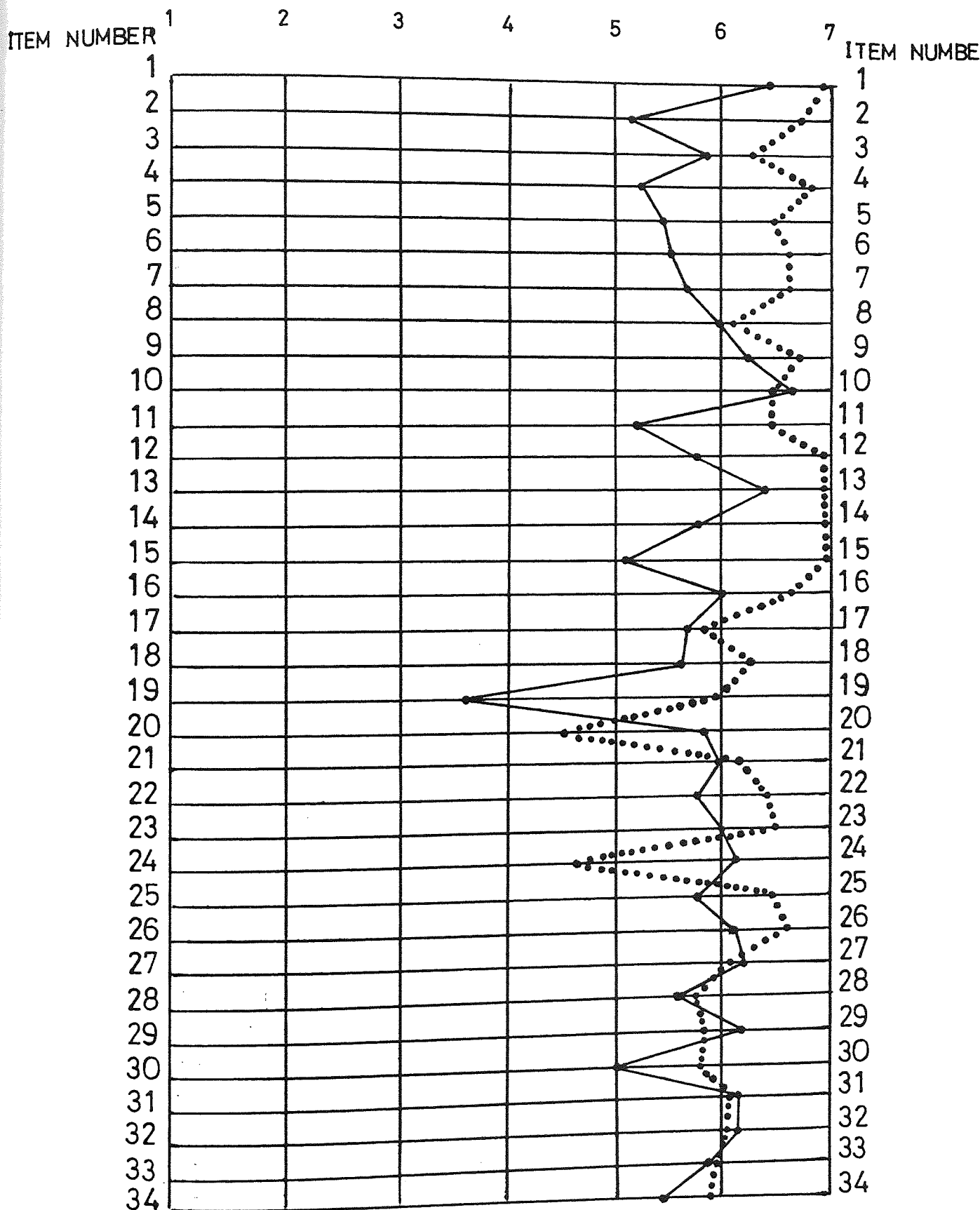


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 'REAL' STORE PROFILES FOR THE WEST INDIAN ETHNIC & WHITE
 ~~~~~  
 GROUPS  
 ~~~~~



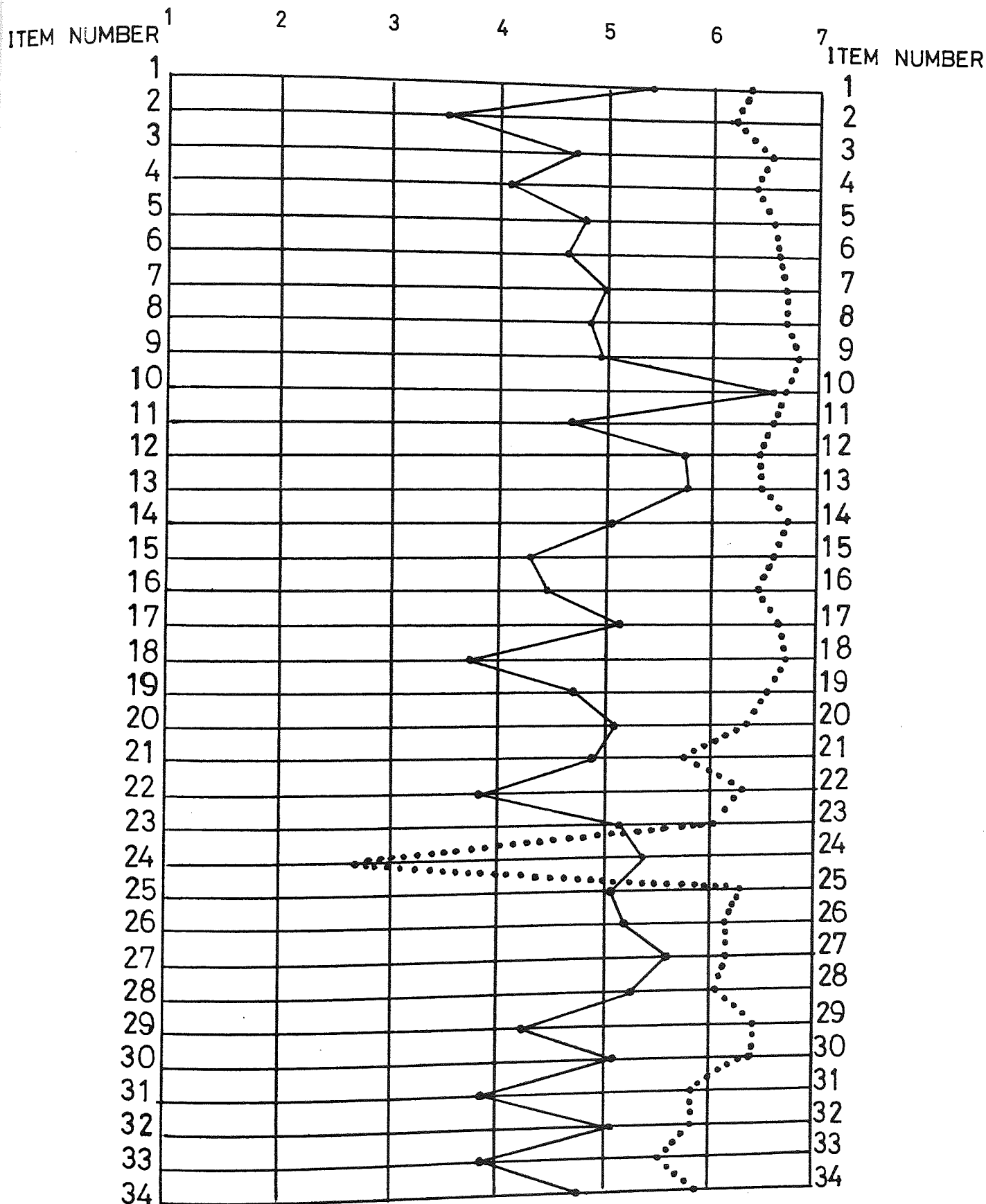
KEY: WHITE —
 WEST INDIAN - - -

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 'REAL' & 'IDEAL' STORE PROFILES FOR THE WHITE GROUP  
 ~~~~~



KEY: 'REAL' —
 'IDEAL'

APPENDIX C. 4
 'REAL' & 'IDEAL' STORE PROFILES FOR THE ASIAN ETHNIC GROUP
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KEY: 'REAL' —  
 'IDEAL' .....

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